

Advisory – Experience on Private Banking & Asset Management



The Client Profile & Challenges

Our clients were seeking solutions in line with the changing dynamics in Private Banking & Asset Management.

Our Involvements

We identified the risk profile of our client and introduced appropriate players (like Private Banks, Funds and International Banks) with suggested strategies to serve their requirements.

- 1) Our client wanted to utilize his own funds in his trading business whilst ensuring an attractive return on his financial assets.
We introduced him to a Swiss Bank who was efficient in combining both products.
- 2) Our client wanted to restructure its Group in a tax friendly environment whilst keeping his family in a western domicile
We designed a multi-purpose structure along with Citizenship by Investment Programs.
- 3) Our client aimed to expand his personal investments into new regions and industries.
We support his family office as non-executive director for this purpose.

Private
Banking

Commodity
Hedging

DCM