

COLLECTIVE AND PRIVATE ASSET MANAGEMENT

Professionals

in Wealth & Asset Management

About us

Established in 2007, SWM SwissWealth Management Ltd. (SWM) is an Asset Management company based in Lugano specialised in the field of private and collective Asset Management. SWM's staff have many years' experience in the Wealth & Asset Management sector, both nationally and internationally. SWM is holder of the CISA (Collective Investment Schemes Act) Federal authorization (Fund Manager) and is therefore part of approximately 170 Asset Management companies of collective investment schemes subject to the Swiss Law on Collective Investment Schemes. Being subject to CISA, SWM has the ability to operate as a Fund Manager and Distributor of investment funds registered for distribution by FINMA and is an active member of the Swiss Association of Asset Managers (SAAM). Experience, along with familiarity in the industry and an excellent infrastructure create the strong platform on which our wealth management activities are based.

What we do

We offer a high quality service; SWM promotes a modern, innovative, transparent, up to date and abreast to developments management.

These are the basis on which SWM has constructed its business model:

- Fund Management
- Private Asset Management
- UHNWI Multi-Family Office Services
- Asset Management Services
- Distribution of own Funds and third party Funds

FUND MANAGEMENT

SWM offers various collective investment solutions (UCITS and others). SWM is also active in the development of new collective vehicles as Investment Manager.

PRIVATE ASSET MANAGEMENT

SWM offers private Asset Management services based on discretionary mandates and active advisory.

UHNWI MULTI-FAMILY OFFICE SERVICES

In addition to ordinary Asset Management activities, SWM is active in providing services dedicated to UHNWI and institutional counterparties.

ASSET MANAGEMENT SERVICES

With the mandate of delegation of management SWM is committed to constantly redefine product types and the risks linked to them.

FUNDS DISTRIBUTION

Authorized under the Collective Investment Schemes Act (CISA), SWM has the ability to operate as a Fund Manager and Distributor of instruments authorized for placement. To date, SWM manages several UCITS V investment funds of a Luxembourg CB Accent Lux SICAV.



HOUSE OF FINANCE

The platform

for the independent Asset manager and for the Fund manager
that will accompany you in the future

Birth of the idea

The last few years have been characterized by major changes both domestically and internationally. Complex regulations, recurring changes and margin pressure are just some of the aspects that have defined, and will continue to do so in the future, the whole asset management industry.

Therefore, the essential aspects needed to better address the future are:

- Containment, monitoring and optimization of costs
- Concentration of resources on creating value-added activities and focused growth
- Optimization of operational management processes
- Continuous and detailed market and regulations' analysis with the aim of developing future-oriented solutions that can guarantee growth, sustainability, risk monitoring and containment.

Essentially a future laden with challenges that, if faced collectively, could create and develop interesting growth opportunities.

The solid offer

"House of Finance" is a platform of excellence providing services to:

- Independent Asset Managers
- Fund Managers

Designed to offer a modular series of optimized and shared services such as:

Asset management services

- Fund Management
- Wealth and Asset Management
- Active Advisory
- Management Mandates

Administrative services

- Legal & Compliance
- Risk Management
- Basic administrative services
- Secretarial services

All of which is supported by a high standard IT infrastructure, from the point of view of both security and systems, through the use of dedicated asset management software.

In short: an innovative, efficient and transparent platform as a basis for optimization and development of asset and fund management activities.

PREMISES AND FACILITIES

A quality location, prestigious infrastructure, high-standing premises with private and common areas. Secretarial services, client and counterparty reception and assistance. Technical supports and cutting-edge systems.

MLA, COMPLIANCE & RISK MANAGEMENT

A benchmark in the management, control and monitoring of risks

- MLA Implementation
- Compliance Management
- Risk Management

ASSET MANAGEMENT SERVICES

Ongoing interaction with an experienced Asset Manager, subject to FINMA federal monitoring

- Management delegation services
- New SICAV funds, SIF, Swiss Funds
- Active Advisory service

ADMINISTRATION

A platform that takes care of all administrative, accounting and management activities

- General administrative activities
- Accounting and billing
- Secretariat

INFORMATION TECHNOLOGY

- Leading IT infrastructure
- High added-value management software
- Supports fully dedicated to the optimization of processes and of concrete business activities

