

External Wealth Management Platform

SWISS-asia 
FINANCIAL SERVICES PTE LTD
瑞士亚洲金融服务有限公司

Are you a Private Banker?

Have you ever considered being independent?

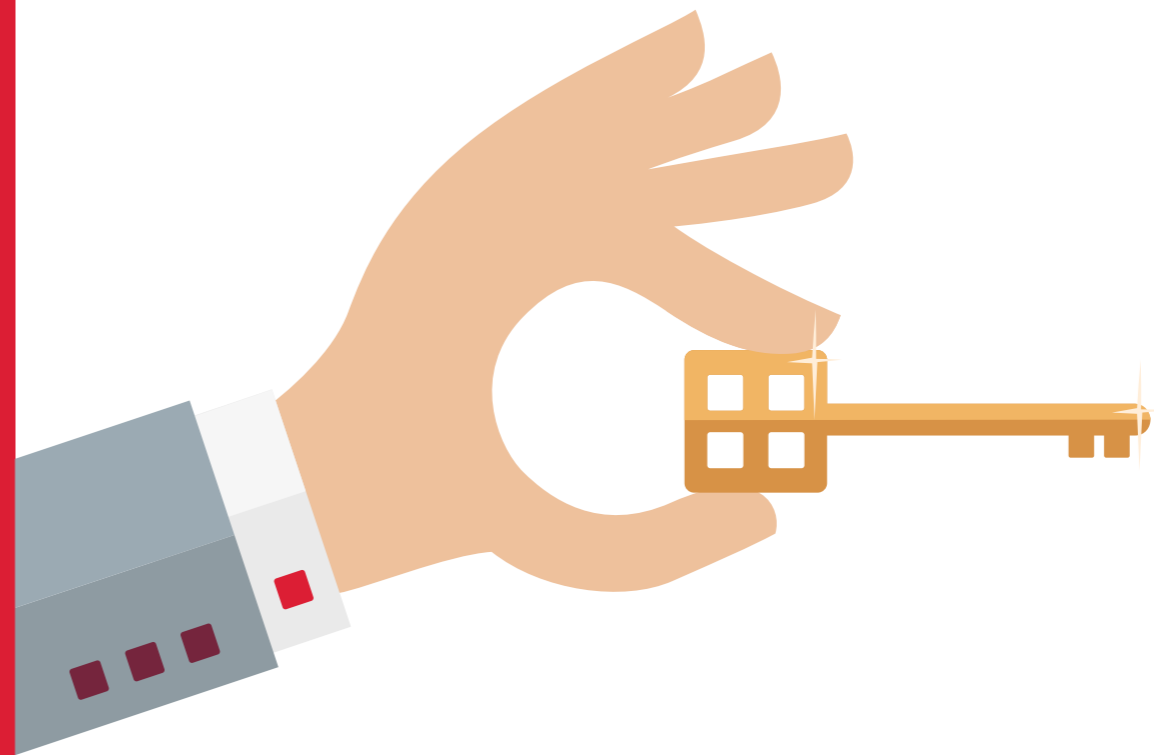
Do you want a lifestyle change?

THE EXTERNAL WEALTH MANAGEMENT PLATFORM

Swiss-Asia provides a platform for External Private Bankers in Singapore and Hong Kong.

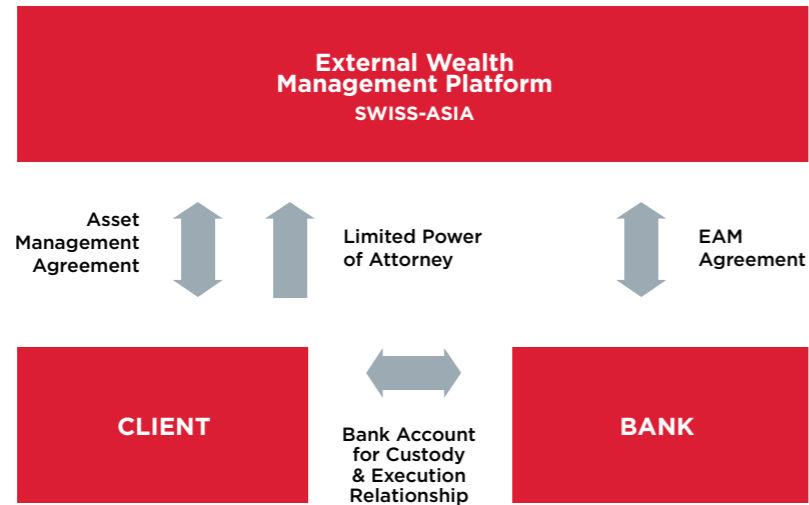
This platform increases the efficiency and eases the processes so that you can leverage on our relationships with the different Private Banks and gain substantial economies of scale.

With the External Wealth Manager Platform, you will be able to focus on relationship and portfolio management without having administrative and compliance worries. Leveraging on our relationships with the various Private Banks, you can enjoy the best executions and economies of scale for transactions. Topped with news highlights and active, unbiased research from Swiss-Asia, you will be empowered to make the best decisions for your clients.



YOUR KEY TO INDEPENDENCE

HOW DOES IT WORK?



You can focus on your investment and functional responsibilities, both of which are clearly delineated, and report to the Management Board.

A strong business administration team is in place to aid you in compliance, operations and administration, allowing you to focus on financial markets while paying particular attention to compliance and client liaison. The remuneration policy is directly linked to each Wealth Managers investment success.

WHY SWISS-ASIA'S WEALTH MANAGER PLATFORM?

Passive Research & News Highlights

On top of materials from Private Banks, you will receive active, independent research from our own investment advisory team.

Administration Support

From opening client relationship to general client administration support, we have a dedicated team of professionals to back you up.

Compliance

Swiss-Asia ensures that your business meets regulatory requirements and we conduct monthly and quarterly monitoring with updated regulations.



An All Encompassing Single view

Having a bird's eye view of the portfolio, including aggregate holdings, risk management, and correlations across holdings, you will be better able to advise your clients.

Major Private Banks' Platforms and Offerings

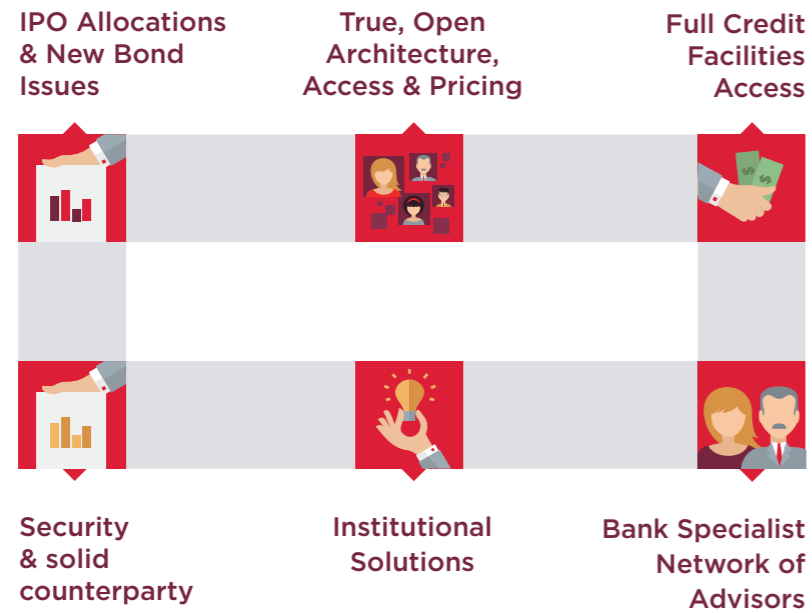
Having exposure to major banks' platform and offering value-adds the services that you are able to provide your clients with.

Operations

We have a competent team to assist you in management of fees as well as invoicing, allowing smooth transactions.

HARNESS THE POWER OF THE MAJOR PRIVATE BANKS' PLATFORMS AND OFFERINGS

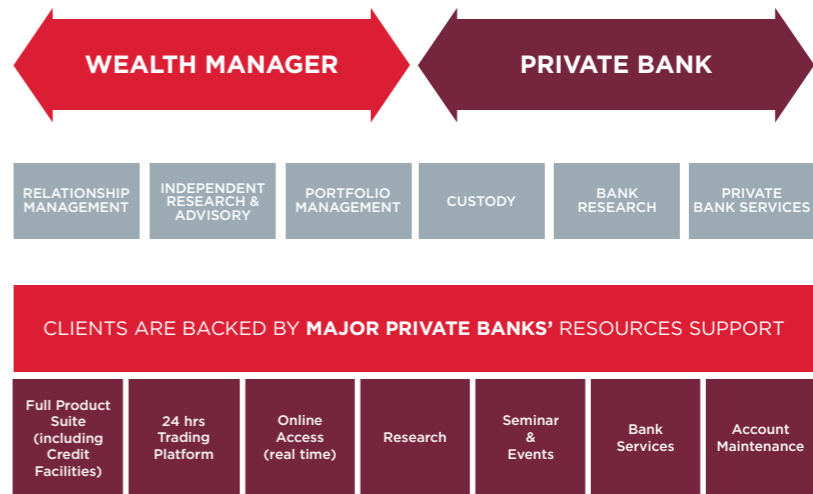
Having exposure to major banks' platforms and offerings will further value-add to the services that you are able to provide your clients with. Some of the benefits from harnessing the power of several banks' platforms and offerings are:



ACCESS TO ALL MAJOR PRIVATE AND INVESTMENT BANKS' PLATFORMS

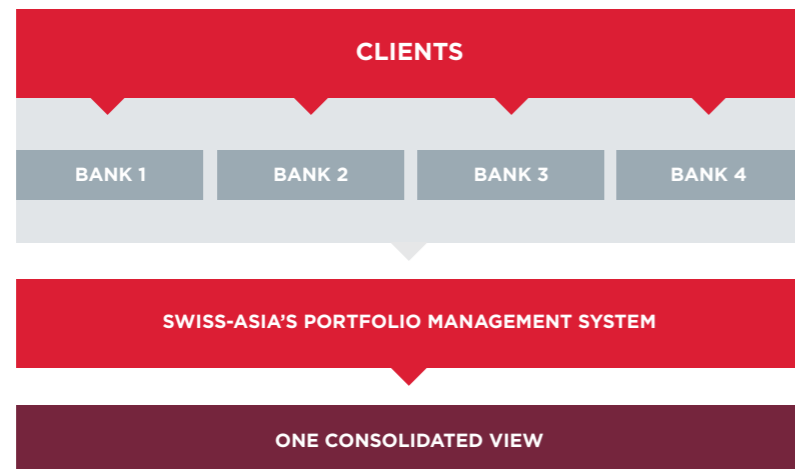
The Wealth Manager Platform allows you to have access to full breadth and depth of all major private and investment banks' platform. You will be able to focus on Relationship Management, Independent Research Advisory and Portfolio Management while clients will be backed by all Private Banks' Resources Support for a smooth sailing experience.

Swiss-Asia will also help with the negotiation process when needed.



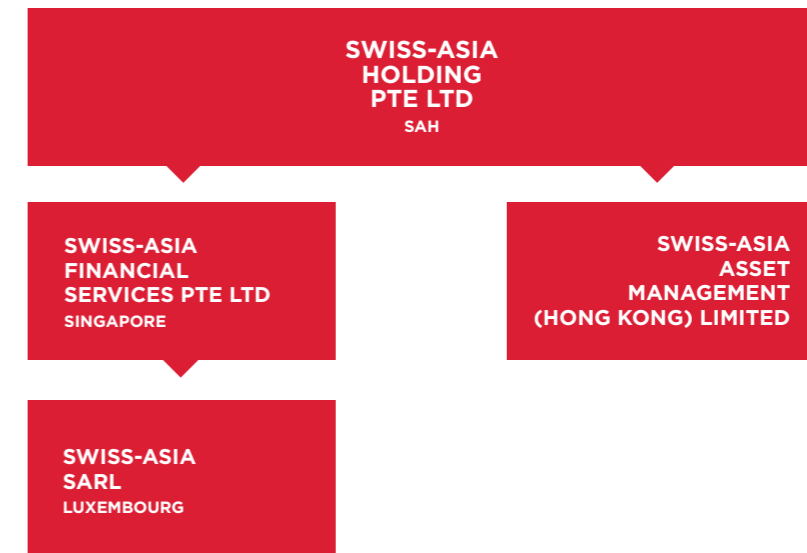
PORTFOLIO MANAGEMENT SYSTEM

With the help of our powerful portfolio management software you will be able to have a comprehensive overview of your clients' portfolios which includes aggregate holdings, risk management, and correlations across holdings. This will allow you to enhance the way you are able to advise your clients.



ABOUT SWISS-ASIA

Swiss-Asia Holding Pte. Ltd. is a Singapore-registered Financial Holding Company with three subsidiaries:



SWISS-ASIA FINANCIAL SERVICES PTE LTD

Founded in 2004, Swiss Asia Financial Services Pte. Ltd. holds a Capital Markets Services License under the Singapore Securities and Futures Act to conduct regulated activities in Fund Management and Advisory for accredited investors.

SWISS-ASIA ASSET MANAGEMENT (HONG KONG) LIMITED

Swiss-Asia Asset Management (Hong Kong) Limited holds a license under the Securities and Futures Ordinance from the Securities and Futures Commission in Hong Kong to carry out regulated activities in Fund Management (Type 9) and Advisory (Type 4) for Professional Investors.

SWISS-ASIA SARL

Swiss-Asia Sarl is a Subsidiary of Swiss-Asia Financial Services in Luxembourg and has been incorporated in 2010 to operate Swiss-Asia's Luxembourg Fund Business.



OLIVIER MIVELAZ
CEO & FOUNDING PARTNER

- Swiss national with more than 30 years of Banking and Fund Management experience and has resided in Asia for over 25 years.
- Started his career with Swiss Bank Corporation (SBC, now UBS) as an Asset Manager in 1982.
- Appointed Head of the Investment Department of BNP Hong Kong in 1991, where he undertook the development of portfolios for institutional clients.



STEVE KNABL
MANAGING PARTNER

- Swiss national with 15 years of experience in the Wealth Management and Financial Services field at General Management level.
- Steve has an in-depth knowledge of Wealth Management as well as Brokerage and Trading operations. He is also experienced in project coordination and operational implementation of complex business strategies. Steve has extensive product knowledge in diverse businesses and business processes that enable him to efficiently translate visions into action.



FRANZ W. LYE
SENIOR RELATIONSHIP MANAGER

Joined Swiss-Asia in 2005



CÉCILE TAYMANS
SENIOR RELATIONSHIP MANAGER

Joined Swiss-Asia in 2010



BRAHANYA UDHAYAKUMAR
INVESTMENT MANAGER

Joined Swiss-Asia in 2009



JASON SOON
HEAD OF FINANCIAL OPERATIONS

Joined Swiss-Asia in 2008



JOANNA BOO
HEAD OF OPERATIONS

Joined Swiss-Asia in 2008

CONTACT DETAILS

SINGAPORE

SWISS-ASIA FINANCIAL SERVICES PTE LTD



OMAR TAHERI
BUSINESS DEVELOPMENT MANAGER

✉ OMAR.TAHERI@SWISSASIA-GROUP.COM

T +65 6887 5790

M +65 8111 7634

SWISS-ASIA FINANCIAL SERVICES PTE. LTD.

8 SHENTON WAY

AXA TOWER #25-02

SINGAPORE 068811

HONG KONG

SWISS-ASIA ASSET MANAGEMENT (HONG KONG) LTD



RICCARDO LEHMANN
MANAGING DIRECTOR

✉ RICCARDO.LEHMANN@SWISSASIA-GROUP.COM

T +852 2776 2211

M +852 6502 8553

SWISS-ASIA ASSET MANAGEMENT (HK) LTD

1801 WINSOME HOUSE,

73 WYNDHAM STREET, CENTRAL

HONG KONG

2015

SWISS-asia 
FINANCIAL SERVICES PTE LTD
瑞士亚洲金融服务有限公司

WWW.SWISSASIA-GROUP.COM