



Asset Management
Switzerland AG



*Save up to CHF 2'500.- taxes per year
and enjoy a nice sailing trip!*



About Asset Management Switzerland

Asset Management Switzerland was founded in October 2006 and provides independent asset and wealth management services.

We highly value personal contact with our clients and are dedicated to offer competent and long-lasting support. Our wealth consulting services are distinguished by their professionalism and continuity, meaning that investors are guaranteed objective advice which is individually tailored to suit their personal needs.

On the basis of solid financial planning, we provide individuals and companies with a neutral overview of financial service, insurance, taxes, assets, and liabilities.



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Our Services

- Asset & Wealth Management
- Financial Planning
- Mortgages & Real Estate
- Retirement Planning
- Insurances
- Domiciliation & Tax Consultancy
- Active Advisory and Discretionary Management Services starting from CHF 100'000







Pillar 3a

Pillar 3 private provision is an important add-on that secures people's individual standard of living in the future. Pillar 3a helps employed people to build up their own retirement assets and ensure their personal retirement provision. At the same time, pillar 3a savers benefit from considerable tax advantages. Pension contributions paid can be deducted from taxable income. Saving in a pillar 3a securities solution offers higher long-term return opportunities than with conventional account solutions.

	Bank	Versicherung
Duration	Flexible	Fixed duration
Payments	Contributions are flexible	Fixed contributions according to policy
Costs	As a rule, no costs	The insurance costs are amortized with the payments
Transfer option / termination	Accounts can be transferred from one bank to another, sometimes for a fee. A 3a transfer is possible at no cost	Transfer is possible. The insurance solution cannot be terminated without loss
Risk protection	Not possible	Premium waiver, death, or disability insurance possible
Sustainability	Guaranteed	Guaranteed





Contact our Advisor to assess your personal financial situation and start saving taxes today!



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