



*Peak Performance In Wealth Management*



## Capital Finance S.A. solutions for individual customers searching for a complete answer to satisfy all of your financial needs.

Capital Finance S.A. is an independent financial services provider. Innovative, trustworthy, and transparent financial services are the foundation of our company's image as a vibrant, adaptable business.

Each of our clients has a unique profile, but they all have the ambition to amass, protect, and distribute their wealth.

Capital Finance S.A. team uses both onshore and offshore variations to deliver creative and tax-efficient investment options, allowing us to achieve this common objective.

After identifying each person's specific needs, we use a cross-disciplinary approach to create a complete financial plan that maximizes investment performance while keeping risk within reasonable bounds. Our unique selling point is our capacity to precisely pinpoint financial objectives and then independently find custom-fit solutions.

Our highly qualified team of professionals at Capital Finance S.A. will collaborate with you to identify the best investment strategy to support the achievement of your objectives.

"...clear, innovative and trustworthy monetary remedies."



“Create a partnership with one of our advisers to ensure the best solutions to attain your financial goals.”

# Unbiased counsel and customized financial planning

## **We interpret a confusing financial market.**

As self-employed financial advisors, we assist our customers in choosing from a vast array of financial products that are offered in the competitive worldwide market of today. In order to assist you in protecting and growing your assets, we will create and carry out a customized personal financial strategy that takes into account your goals, interests, and worries while utilizing practical tactics.

## **Customized remedies.**

Our products and services are expertly crafted and supported by cutting-edge technology—a potent combination that will enable you to achieve your financial goals with genuinely customized solutions.

The staff at Capital Finance S.A. will put together a selection of goods and services to meet each of your finances, despite its complexity, diversity, and variety.

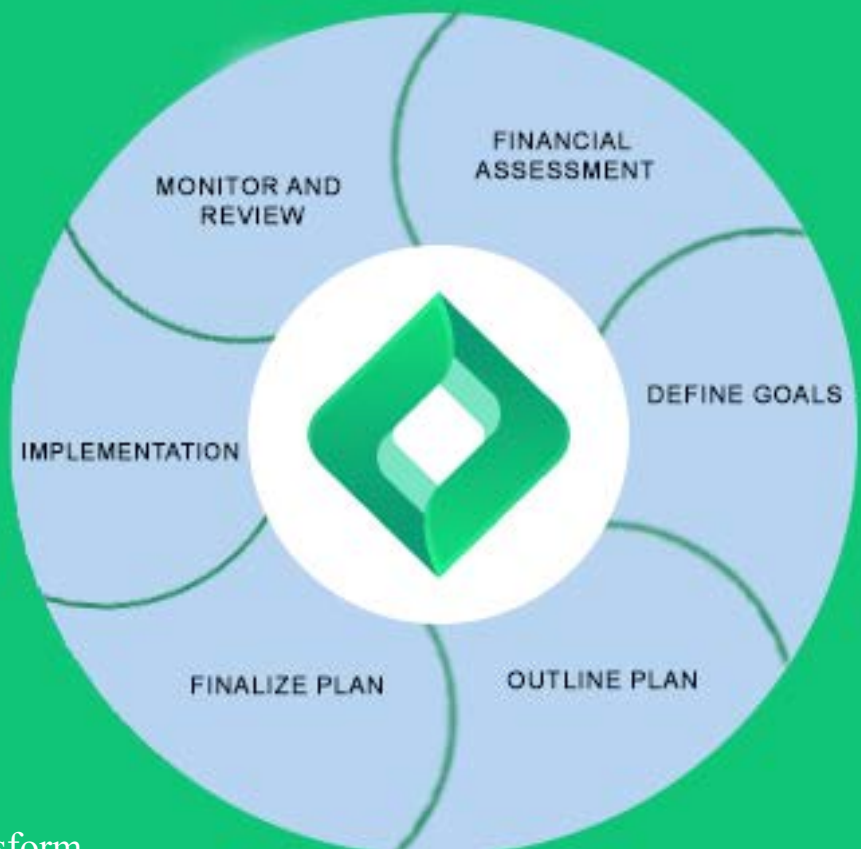
Every customer at Capital Finance S.A. is central to the wealth management procedure. Following an evaluation, our investment decisions are based on the plan that was agreed upon with you. You will always have complete access to information and complete control over how you use your assets.

As an alternative, our advisors are on hand to keep a careful watch on the ever-changing financial market trends on your goals and adapt to suit your financial needs.

Do you feel certain that:

- You're getting good, unbiased, and private advice?
- You comprehend tax efficiency in great detail are there any investing options that involve offshore environments?
- You have enough money, your assets are secure, and flexibility to guarantee a good retirement income?
- You are protected in the event of unforeseen personal events influencing your capacity to keep your preferred quality of living?
- Will your intended bequests be appreciated by your beneficiaries?

*For additional information about the responses to these and other queries, get in touch, Talk to CAPITAL FINANCE S.A.*



“Take the opportunity to transform your financial future - Give adviser of Capital Finance S.A. a call.

# Comprehensive wealth management solutions to reach your financial goals

## Creative fixes for everyday issues

Our clients need additional help to secure their financial goals in a financial world that is becoming more complex and globalized. People can have a better knowledge of their ability to directly control their own destiny with the help of Capital Finance S.A..

## Consultancy Services from Subject Matter Experts

Our wealth management specialists will perform a thorough evaluation of your unique situation and offer an accurate picture of your financial requirements, both now and in the future. They will offer guidance and remedies in accordance with your specifications and inclinations, such as organizing your assets into suitable investment instruments, providing customized investments, maximizing taxation, safeguarding personal property, and insurance, wills and estate preparation, and provision for liquidity.

## Using discretion in management to maximize potential

Additionally, we provide complete discretionary portfolio management for our clients.

From a variety of asset classes, our investment specialists will spot opportunities and choose the best allocation to maximize returns for any chosen degree of risk.

## Retirement and pension planning to safeguard your way of life

Numerous items are available to guarantee that you won't have to worry about money during your retirement. These consist of a range of adaptable pension plans and savings plans that are tailored to your specific needs in order to guarantee alignment with your projected retirement income needs.

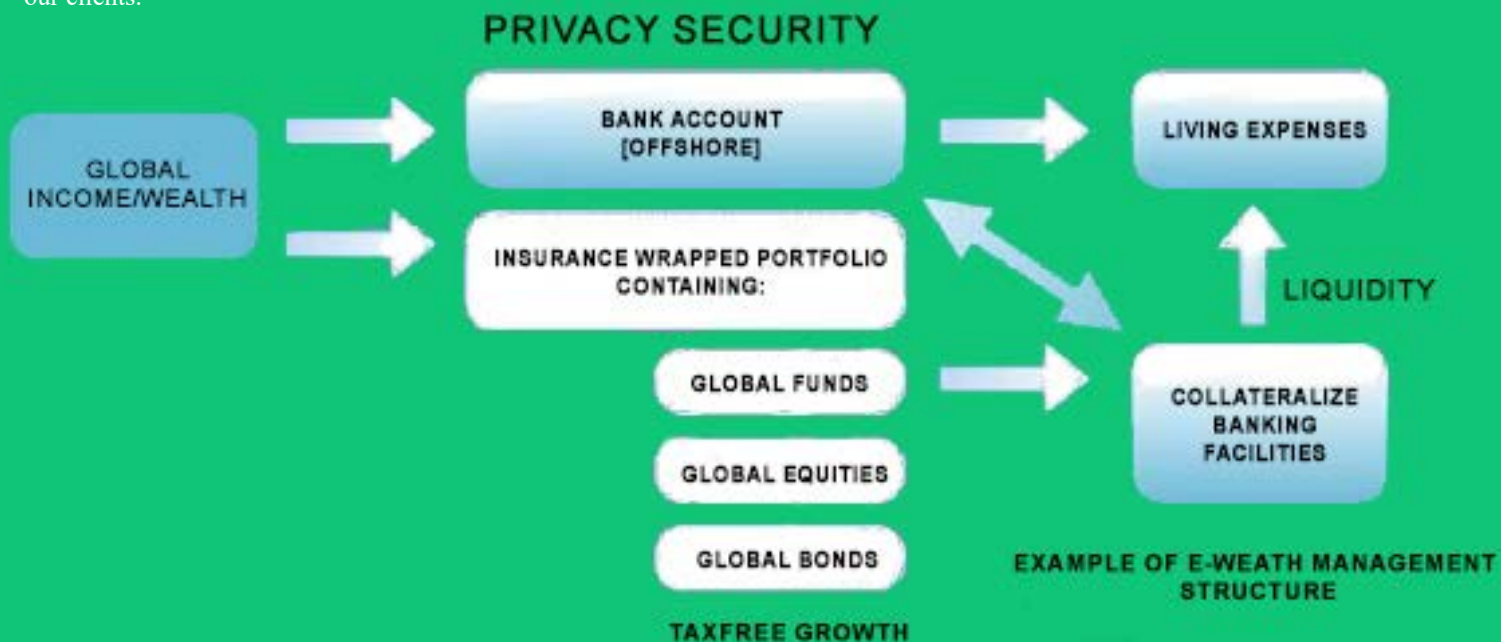
## Making estate plans to protect future generations

Your assets can be safeguarded for transfer to your beneficiaries with the help of appropriate structure. With the help of our custody and execution services, you may manage your portfolio and asset allocation directly while still getting guidance and support from our professional market specialists. By leveraging the investment platforms of our affiliated businesses, we provide an open architecture framework that enables you to handle investments economically.

## Managing offshore to optimize potential

When it comes to using banking services, savings plans, and investment structures in a tax-efficient manner, expatriates and foreign individuals enjoy an exclusive offshore edge. Capital Finance S.A. enables you to investigate the various alternatives for organizing your investments and savings in our adaptable, safe, and tax-efficient offshore facilities.

For additional information regarding our consulting services, insurance products, offshore facilities, pension, retirement, and estate planning, please contact one of our consultants.





“Our services and products are professionally developed and backed by advanced technology; a winning combination that helps to fully realize your financial objectives.”

# Investment structures for simple and effective asset management

## Unrestricted access to a vast array of asset managers and funds

With its extensive network of investing platforms, Capital Finance S.A Wealth Management offers affordable and adaptable access to investment funds. The direct connections we have with top organizations help to lower transaction costs as well.

## Pensions and insurance

Several of our customers, particularly foreign nationals need guidance on foreign insurance and pension plans as part of their investing strategy. We are able to create structures that are tailored to obtain investments from a variety of reliable sources while optimizing tax efficiency.

The application of insurance wraps, sometimes referred to as portfolio contracts or insurance bonds.

## Platforms with open architecture

We prefer investing platforms that do not restrict the selection of funds and the tools that are contained in a portfolio. We provide unrestricted access to the best and widest variety of financial instruments in order to optimize performance.

We give you the ability to trade on the top exchanges in the world across a variety of asset classes. Available products include a variety of funds, bonds, stocks, and foreign currency investments.

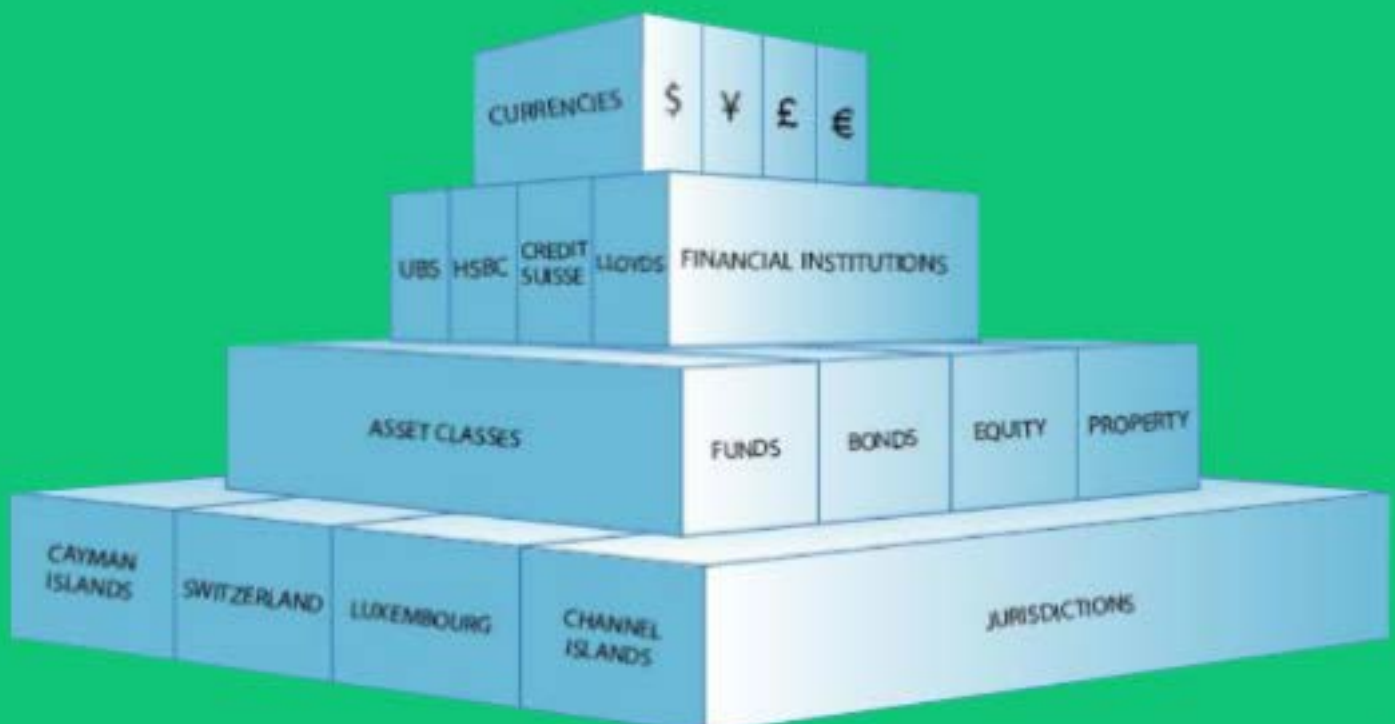
Encompassing most asset categories. If an investment plan calls for it, it is also feasible to make investments in unlisted securities.

Due to Capital Finance S.A's numerous unique connections with asset managers, investors can take advantage of advantageous product pricing.

Our expert portfolio management services allow investors a special chance to create a profitable and adaptable investment strategy. Additionally, Capital Finance S.A may manage assets by making use of already-existing investor banking arrangements.

Offering first-rate banking services is the perfect financial answer for investing and saving.

"In order to achieve peak performance, We provide independence in using the finest and broadest selection of financial instruments at your disposal."



INVESTMENT STRATEGY BASED ON SOLID FOUNDATIONS



## Secure and flexible access and liquidity

### Investment plans that combine the best aspects of

Though most of Capital Finance S.A.'s products are built around lump sum investments and long-term savings, we understand that investors also require short-term flexibility. Our financial arrangements provide flexible access to investment funds that can be withdrawn from one or more ad hoc facilities. Investment portfolios can also be put up to enable "back to back" lending at favorable rates, secured by underlying assets. This makes it possible for investors to keep taking advantage of the growth advantages of the financial markets.

### Client Support

Keeping up with the ever-evolving financial markets is never easy, and Capital Finance S.A. understands that investors might not always be able to keep up with advancements in the market. We have a markets and trading department dedicated to continuously monitoring global financial markets to guarantee investors are up-to-date with the latest financial information. When necessary, our advisors utilize this data to actively manage investments.

### Safety

Client monies are not kept by Capital Finance S.A. We work with several of the most reputable financial institutions to assist in ensuring the safety and security of our client's money.

"...investors keep going keeping the advantages of liquidity."





## Our Principles

### **Establishing a long-term, trust-based connection**

Capital Finance S.A. offers a distinctive service by fusing cutting-edge global investment solutions with the classic Swiss banking traditions.

Our commitment to you in wealth management is to safeguard your assets and interests, to build a long-term relationship based on trust, and to offer professional financial guidance. This is accomplished while upholding the strictest confidentiality guidelines.

Honesty and security to ensure your long-term financial success and a lasting partnership between Capital Finance S.A. and you.

"We provide private clients with all the customized and all-inclusive solutions they require to achieve their financial objectives."

