

Altius is a multi-custodian wealth management platform. By offering an innovative approach, we unite the flexibility of an independent asset manager with the strength of a large family-owned banking group. The best of both worlds.

ALTIUS



Member of the Swiss Association of
Asset Managers (SAAM)

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Concept

The company

Altius Finance S.A. is an independent asset management company, and member of the Swiss Association of Asset Managers (SAAM). The Espirito Santo Group, a minority shareholder, provides Altius with necessary infrastructure in the fields of IT, compliance and risk management. The remaining shareholders are the senior executives of Altius.

The network

Altius works with a selection of reputable custodian banks and independent service providers. Additionally, you will benefit from the global network of the Espirito Santo Group, allowing multiple synergies.

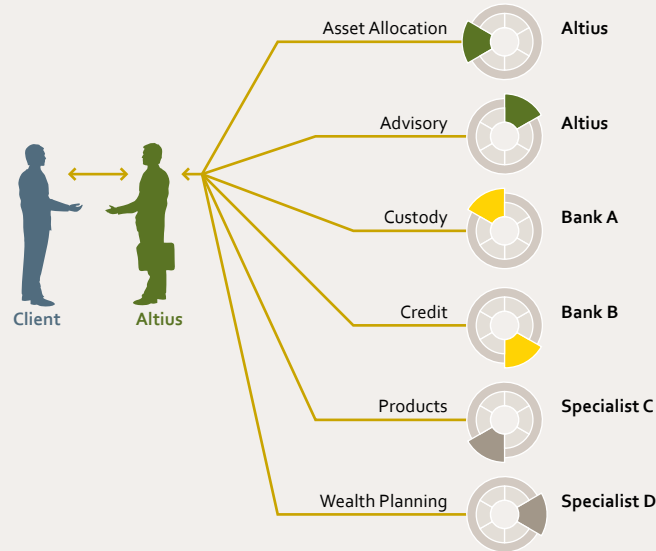
The managers

After years of experience in asset management, your banker joined Altius to devote himself exclusively to his clients. He takes the time to build quality, lasting relationships. Altius provides him the administrative and technological support he needs to achieve this commitment. Altius also ensures the stability of business relations, allowing for the long-term planning of your estate.

The technology

Your manager can rely on technical support, back-office and IT services audited and validated by the international certification SAS70-Type II. You will therefore find – in an independent structure operating on a human scale – the quality of service, reliability and confidentiality you demand from the Swiss banking tradition.

The Altius model



Altius combines the best of both worlds, i.e. the organisation, network and lasting quality of a bank, but also the objectivity and autonomy of an independent manager.

The Altius model proposes different custodian banks, as well as a network of external service providers in all fields related to wealth management. This flexibility, transparency and advanced technology allows Altius to clearly distinguish itself from the traditional offer.

Altius is responsible for investment advice or the discretionary management of your portfolio, according to the mandate you choose.

Altius acts as a filter between you and different specialists in order to find a tailor-made solution. This approach saves you valuable time, ensures transparent pricing and protects you from potential conflicts of interest.

Services

The mandates

Altius offers two types of mandate: the discretionary management mandate and the advisory mandate. In both cases, Altius will act in concerted fashion to offer you real added value.

The investment philosophy

Altius has a classic investment approach in which the principles of diversification, transparency and liquidity play a leading role. Diligence, pragmatism and common sense are evident at every stage: strategic reflection, allocation decisions, choice of managers, execution and risk management.

Altius adopts an open architecture approach making it possible to invest with the best managers in each asset category.

Consolidation and reporting

If your assets are deposited at several banks, the consolidation and reporting system offered by Altius will give you a global view of your portfolios; allowing for an efficient management and thus cost reductions.

A global approach

Thanks to its extensive network, Altius can also accompany you in other areas relating to the management of your wealth:

- Family office
- Legal advice
- Fiduciary services
- Fiscal planning
- Estate planning
- Negotiation of loans