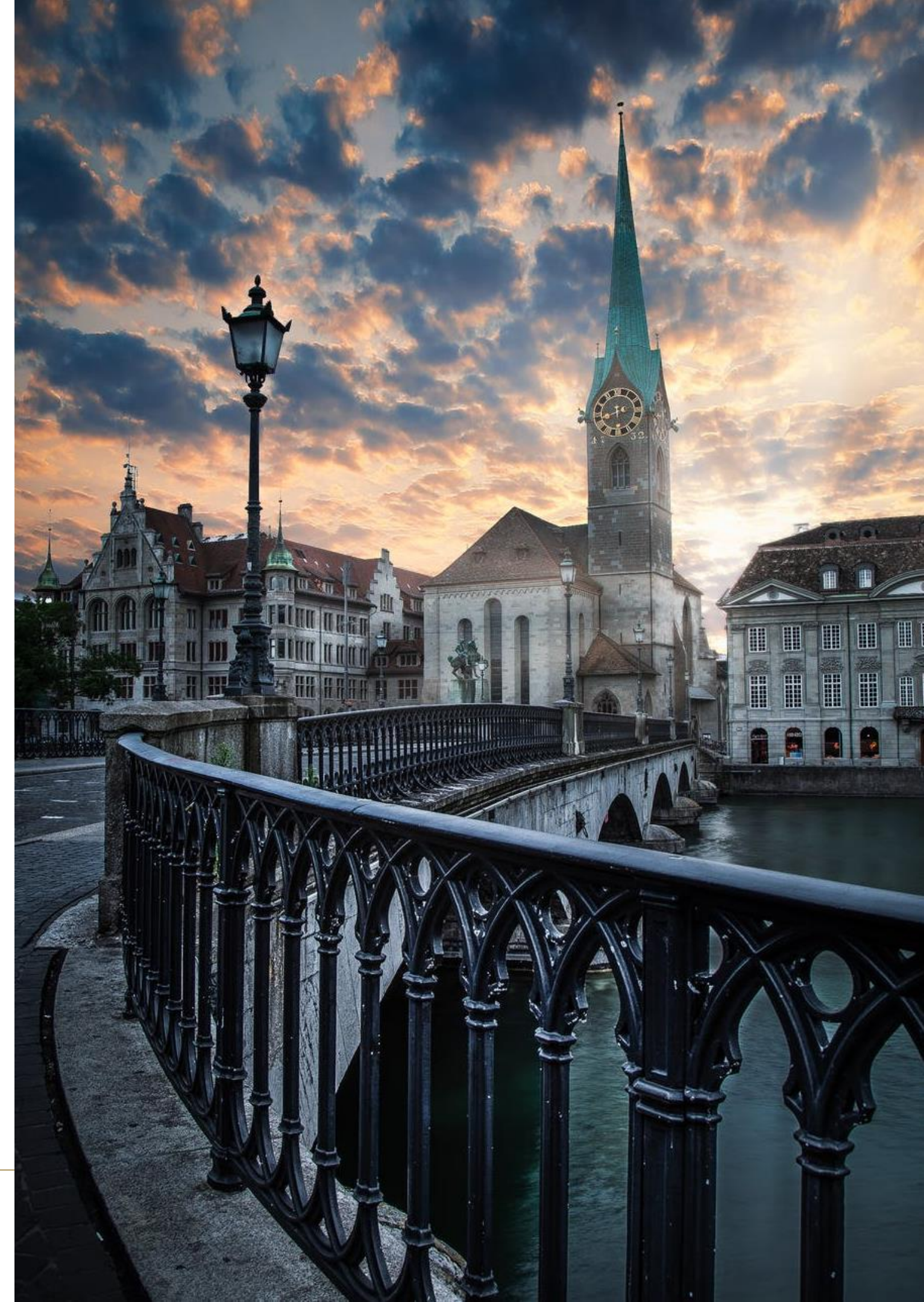


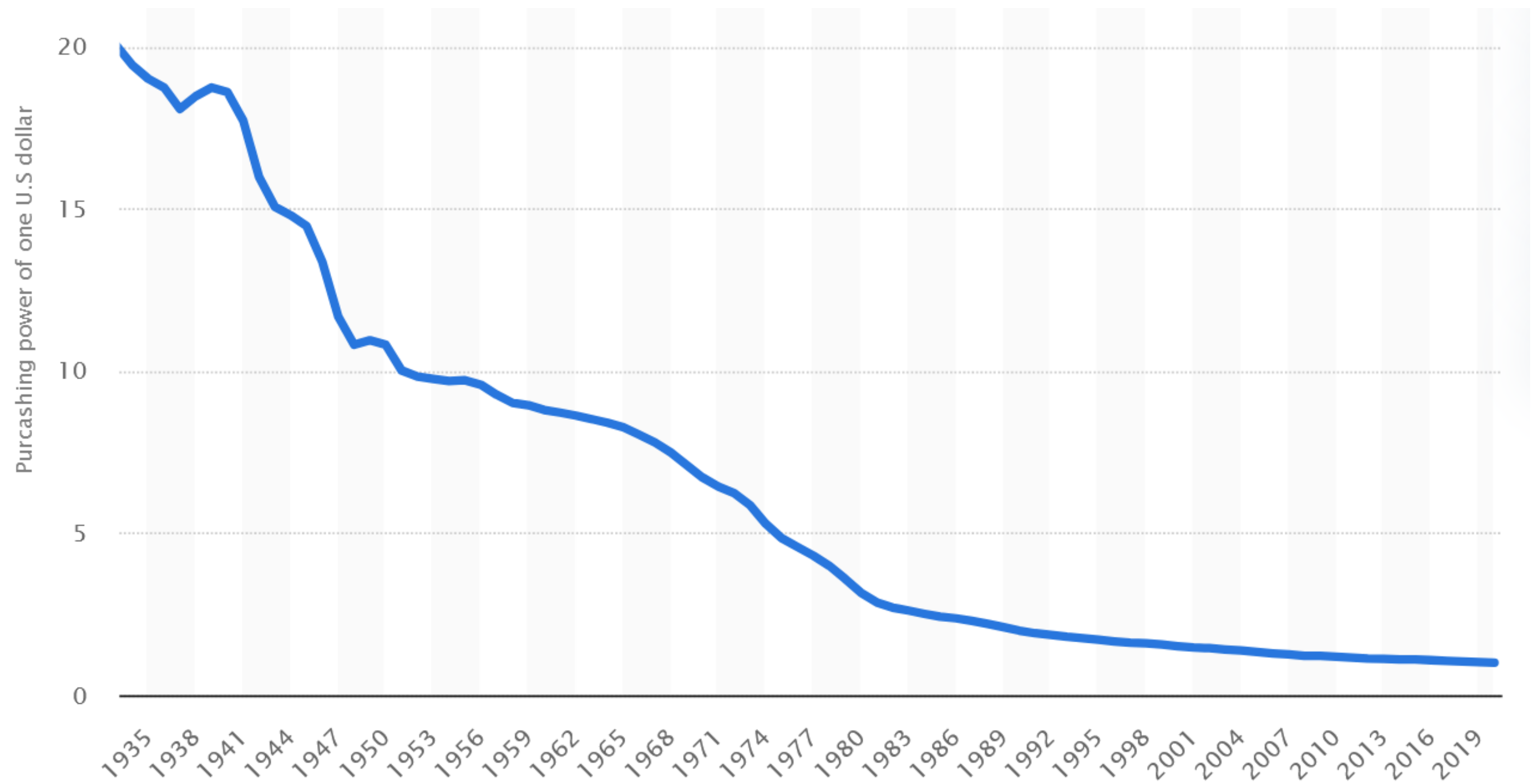
# Accessible Swiss Wealth Management For Americans

By Jess Roberson

WHVP



# Purchasing Power of the USD





# Content

- Working with an Independent Asset Manager
- Switzerland as a Jurisdiction
- Working with WHVP and Offshore Investing

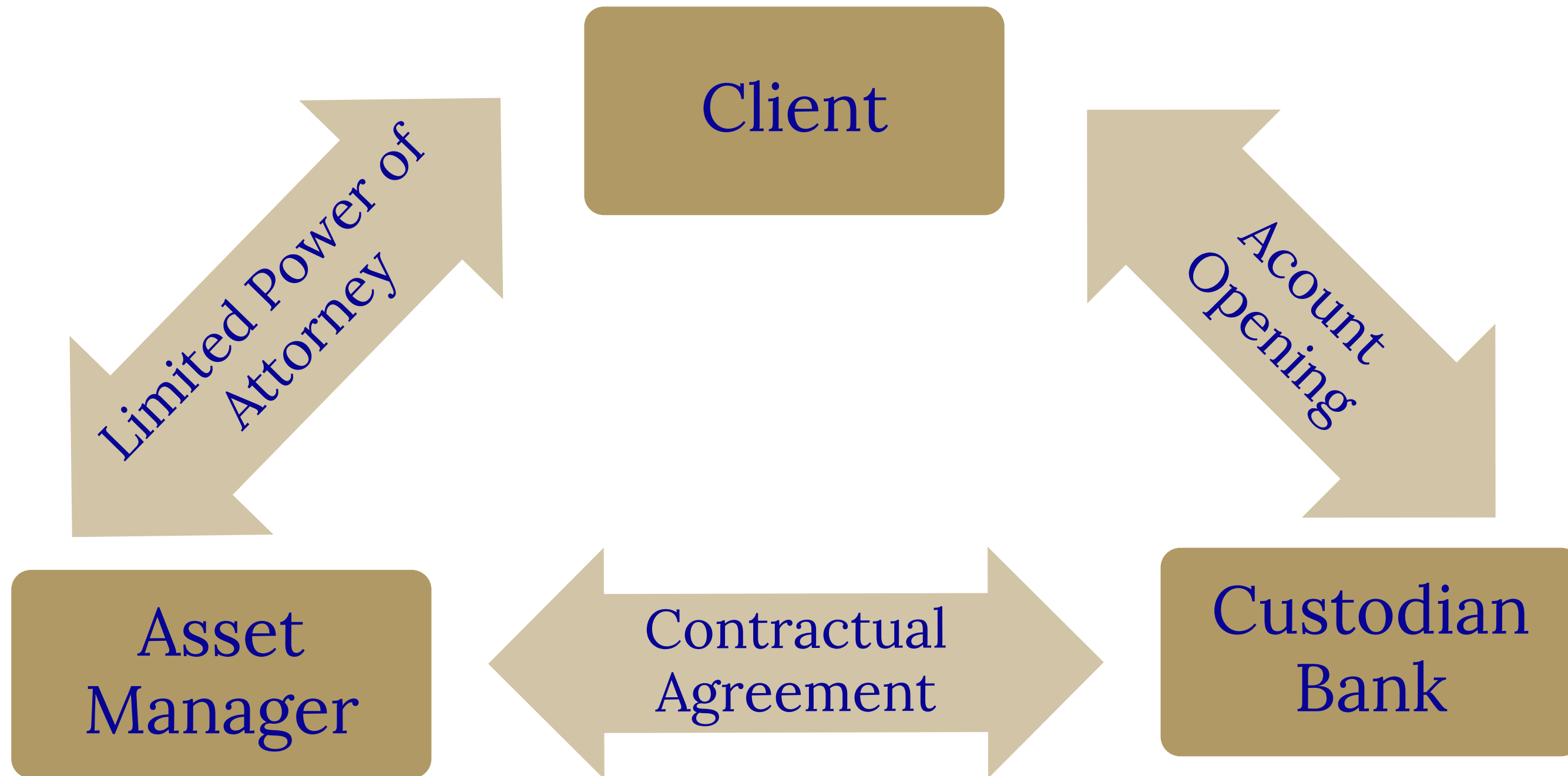


# Jess Roberson

- Administration, Marketing Strategy, and Investment Research
- Currently playing for the Swiss National Rugby Team
- Bachelor of Science, Finance and International Business
- Fluent in English, German, and Swiss-German



# The Set-Up





# Working with an Independent Asset Manager

- Independent Partner with Focused Specialization
- Personalized Service with Direct Access to Owners and Continuity
- Choice of Custodian Bank and Lower Minimum Size
- Broad Network of Partners



# Benefits of an Offshore Bank Account

- Geographical Diversification and Different Portfolio Emphasis
- Added Layer of Asset Protection and Enhanced Privacy Protection
- Protection Against a Sinking Domestic Currency
- Enhanced Overall Stability



# Challenges of an Offshore Bank Account

- Costs
- Paperwork
- Finding a Competent Partner
- Distance and Time Difference





# Switzerland as a Financial Jurisdiction

- Long History of Economic Stability and Political Neutrality
- Exceptional Education System, Professionalism, and Integrity backed by Strict Federal Laws and Regulations
- Wealthy Nation with High Reserves and Low Debt
- Deposit Protection Scheme
- Swiss Franc as a Safe Haven Currency



# The Process

- Introduction Call or Video Meeting
- Providing Basic Information on Background, Finances, Residency, and a Passport Copy
- Completing the Account Opening Paperwork and Funding the Account
- Discussing the Initial Investments and then Continual Communication about the Portfolio

# Meet Our Team



From left to right:  
Daniel Koller, Jess Roberson, Julia Fernandez, Jamie Vrijhof-Droese, Urs Vrijhof-Droese

# Introducing Our Services

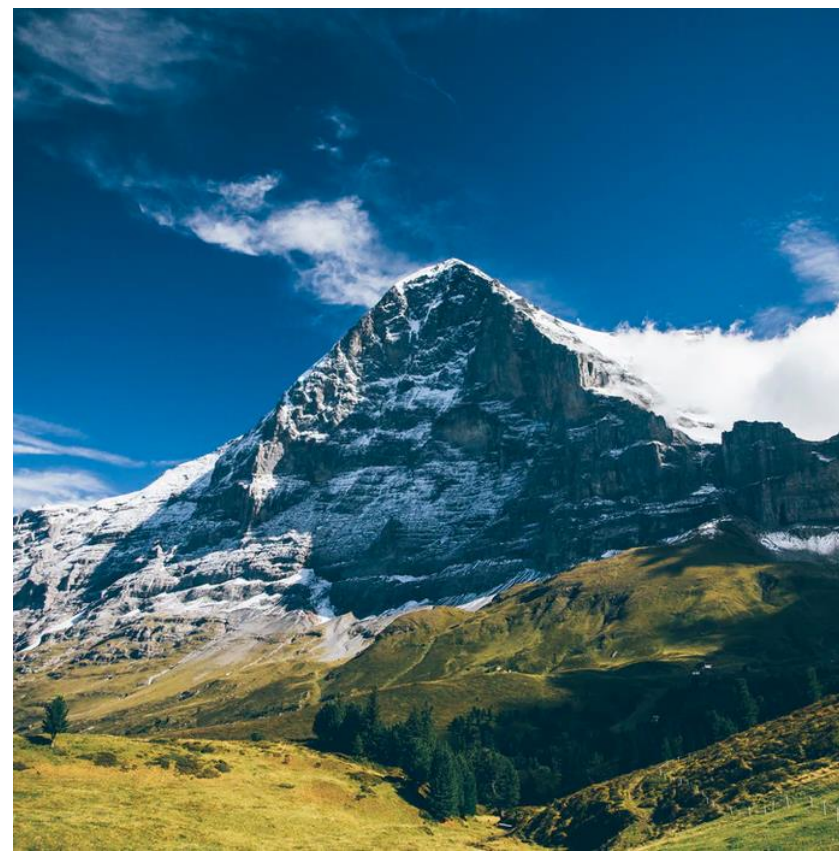
## **Pilatus – Permanent Portfolio**

Standardized moderate investment portfolio.



## **Eiger – Asset Management**

Tailor-made investment portfolio at the partner bank of your choice.



## **Dom – Concierge Level**

Highly personalized service including concierge services.



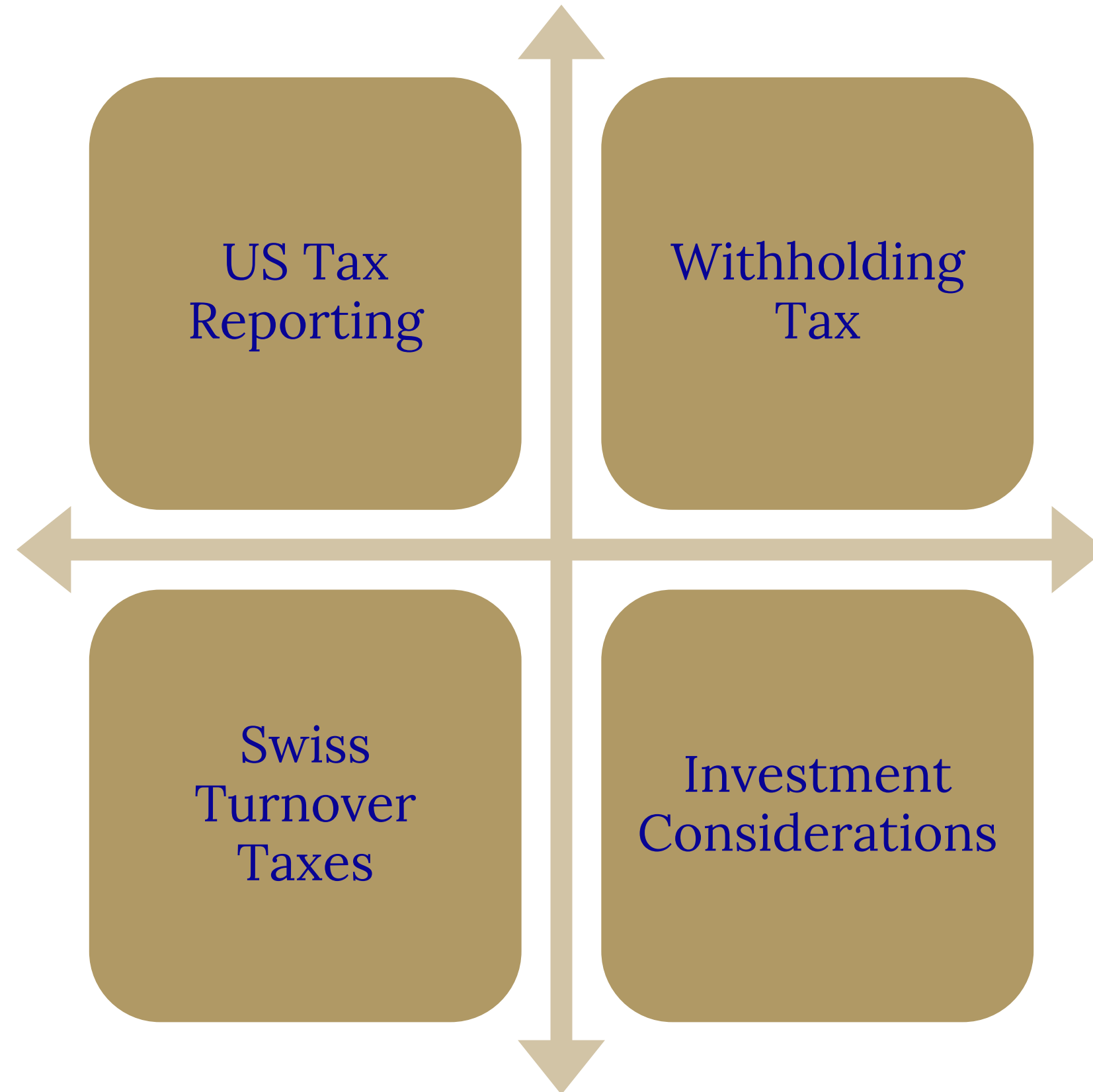
All services available for personal accounts, joint accounts, individual retirement accounts, trusts, LLCs and foundations.



# The Investments

- Conservative Long-term Oriented Capital Preservation Strategies Excluding the US Market
- Direct Investments into Stocks, Bonds, Precious Metals and Foreign Currencies
- Stock Selection: Country and Currency, Industry and Company Attractiveness, and Investment Opportunity
- No PFICs

# Tax Considerations



# Next Steps



- **Visit the WHVP booth** to receive a **free book**
- Be part of our raffle for a chance to **win five silver coins**
- And **set-up a complimentary consultation** to check if Swiss wealth management is a suitable solution for you: **[jr@whvp.ch](mailto:jr@whvp.ch)**