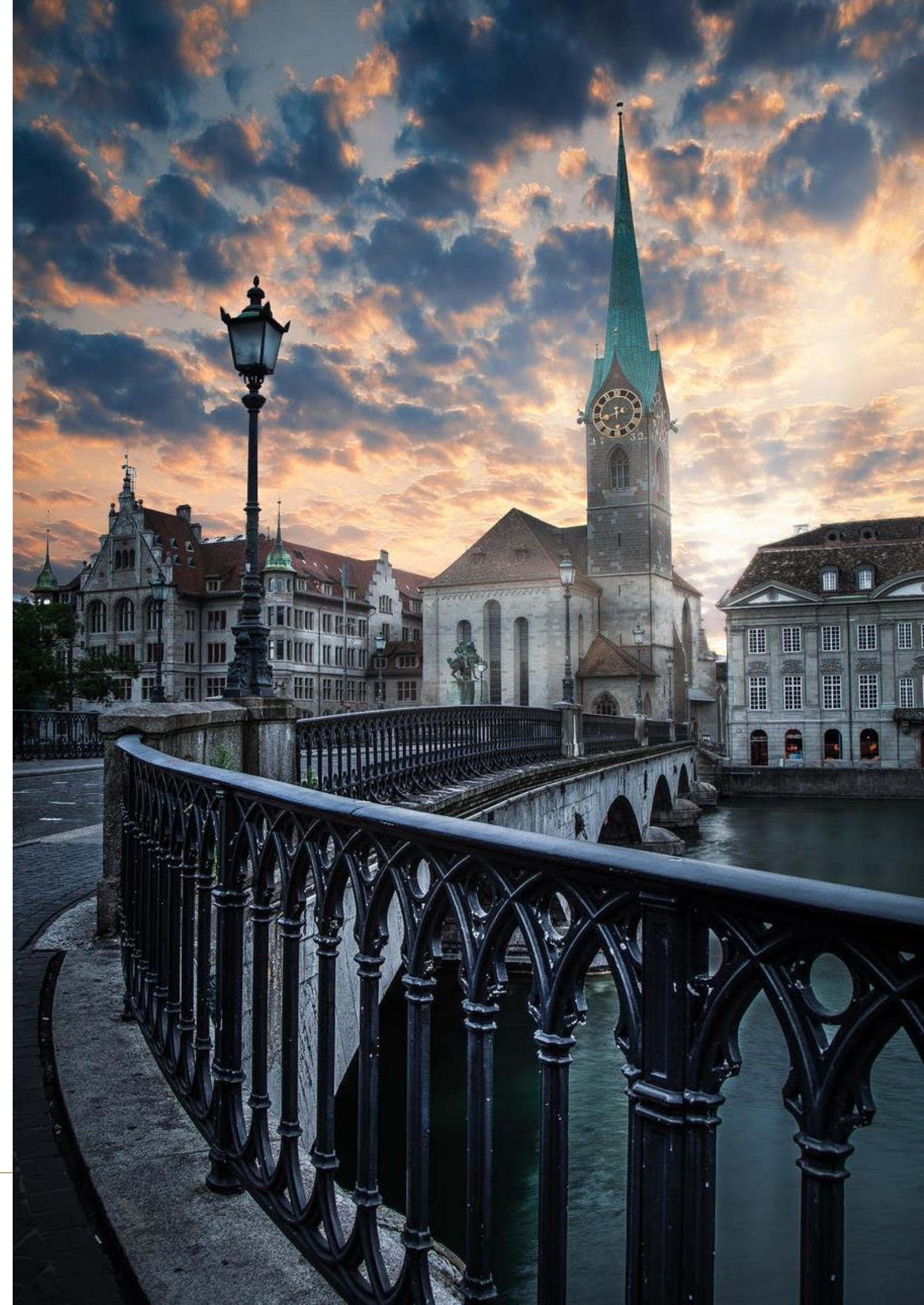


# Grüezi and Welcome

Weber Hartmann Vrijhof & Partners



## Who We Are

Weber Hartmann Vrijhof & Partners AG is an independent asset management firm founded 30 years ago in 1991. We started the company in the beautiful city of Zurich. We have built a rare reputation of expertise in working with U.S. clients. Consequently, we are registered with the SEC in the U.S., which gives you security about our experience, knowledge, and reliability regarding U.S. rules and regulations. We have been crowned [2021's Best Service Offering for North American Clients](#) by the Wealth Briefing Awards for Swiss External Asset Managers.

## Benefits of Switzerland as a Financial Jurisdiction

- Longest Track-Record in Private Banking
- Global Leader in Cross-Border Wealth Management
- Economic Stability
- AAA Rating
- Political Neutrality
- Low Public Debt
- Crisis Resilient
- Modern and Innovative Regulatory Framework
- Most Innovative Country in the World
- Long Track-Record of Sustainable Finance
- Highest Standards for Data Protection and Cyber Security
- The Crypto Valley in Zug is a Global Leader

## Benefits to Partnering with us

- True International Wealth Diversification
- Protection Against a Sinking Domestic Currency
- An Added Layer of Asset Protection
- Enhanced Privacy
- Access to European Private Banks
- Extensive Experience and Specialization for Americans
- Personalized Service for Long-lasting Relationships
- Independence with Zero Conflict of Interests
- Flexible and Entrepreneurial Mindset
- A Young, Driven, and Passionate Team

## Investment Philosophy

Our investment philosophy is structured to insulate against US dollar depreciation yet capitalize on overseas investment opportunities. We invest directly in equities, bonds, foreign currencies, and precious metals. We apply strict and conservative asset management principles and exclude USD investments. We focus on regions, countries, and their corresponding stable and promising industries when approaching investment opportunities. One of our main targets is capital preservation, as well as ensuring a personalized service suited to your particular situation and needs.

## Our Culture

### **Knowledge**

We foster a culture and atmosphere that eliminates any potential negative feelings you have about offshore banking by providing knowledge and guiding you through the whole process.

### **Customer Service**

We put the client experience at the center of everything we do and live up to the high expectations people have regarding private banking and wealth management in Switzerland.

### **Passion**

Culture is not something we take lightly, as we know that the only way our clients will be genuinely pleased working with us is if every team member is passionate, eager to help, and willing to go the extra mile.

# Introducing our Services

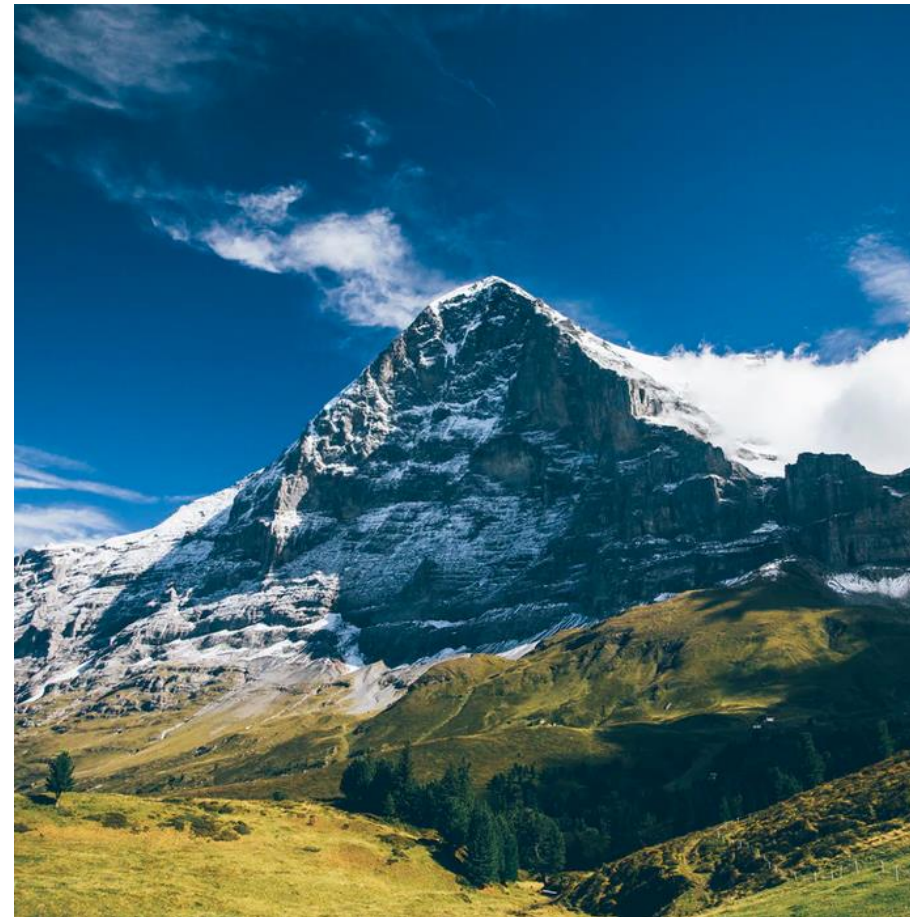
## **Pilatus - Permanent Portfolio**

Wade into the waters of international diversification with a standardized moderate investment portfolio.



## **Eiger - Asset Management**

Profit from international diversification with a tailor-made investment portfolio at the custodian bank of your choice.



## **Dom - Concierge Level**

Investment strategy tailored through a personalized service. Gain access to our concierge services and a yearly personal visit.



## Overview over Services

	Pilatus	Eiger	Dom
Minimum	\$ 250'000	\$ 500'000	\$ 1'000'000
Management Fee	1%	1.5%	1.5%
Additional Flat Fee	n.a.	n.a.	CHF 10'000
Call / Virtual Meeting	Yearly	Up to Quarterly	Up to Quarterly
Personal Relationship Manager	✘	✘	✘
Guidance through Account Opening Process	✘	✘	✘
Online Banking Access	✘	✘	✘
Quarterly Statement	✘	✘	✘
Quarterly Report	✘	✘	✘
Tax Statement		✘	✘
Tailor Made Strategy		✘	✘
Free Choice of Preferred Custodians		✘	✘
Yearly Personal Visit at City of your Choice			✘
20h Concierge Service per Year included			✘



# Meet our Team



## **Jamie Vrijhof-Droese**

**Managing Partner**

Contact: [jv@whvp.ch](mailto:jv@whvp.ch)

[LinkedIn Profile](#)

### **Profile**

Jamie Vrijhof-Droese is a cross-border wealth management expert, public speaker, and author. She heads the business development of WHVP and advises a group of international clients concerning international diversification and asset protection.

### **Qualifications**

- MBA from the University of St. Gallen
- Bachelor of Science in Banking and Finance from the Zurich University of Applied Sciences
- Fluent in English, Swiss-German, and German

### **Experience**

- 10+ years of experience in the financial industry including private banking, financial planning and wealth management.
- 3 years of which spent in various departments of one of the largest Swiss universal banks.
- Board Member of the Swiss Association of Wealth Managers.
- Co-Author of “Swiss Money Secrets”, Banyan Hill Publishing 2018.
- Co-President of the Neujahrsmarathon Zürich.

# Meet our Team



## **Urs Vrijhof-Droese**

**Managing Partner**

Contact: [uvd@whvp.ch](mailto:uvd@whvp.ch)

[LinkedIn Profile](#)

### **Profile**

Urs Vrijhof-Droese is an expert in the corporate governance of external asset managers. He heads WHVP's investment committee and advises a group of international clients concerning international diversification.

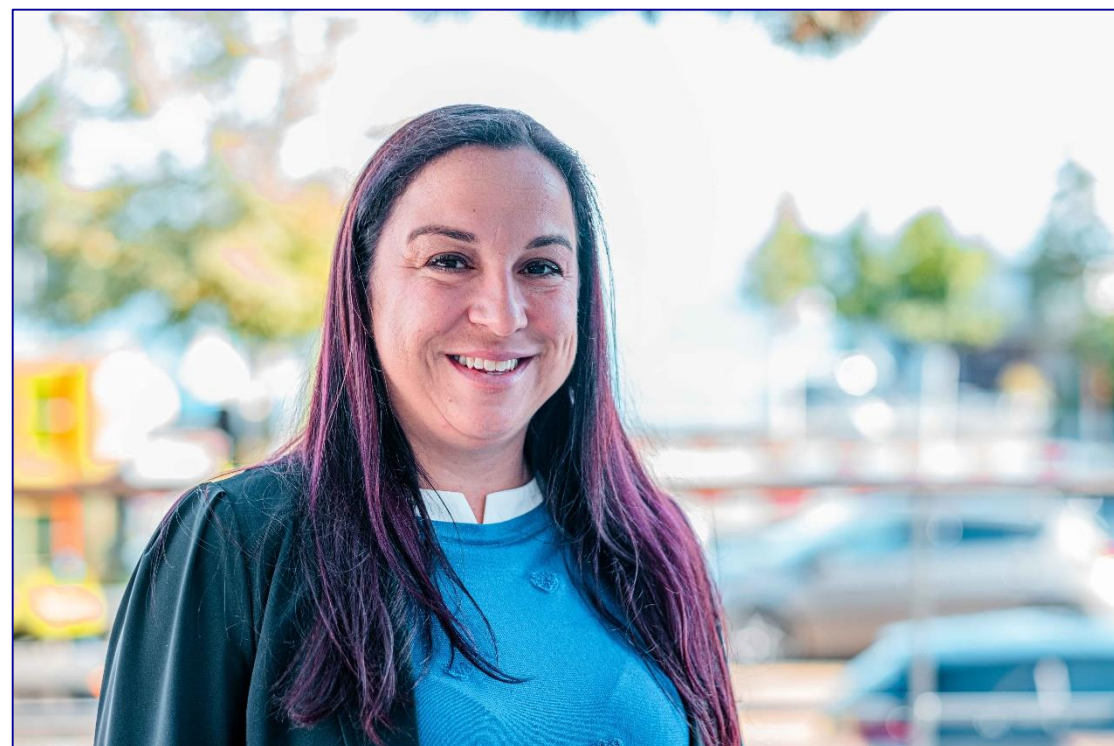
### **Qualifications**

- Chartered Financial Analyst (CFA) Level I candidate
- Master in Law and Economics from University of St. Gallen.
- Fluent in English, Swiss-German, and German

### **Experience**

- 12+ years of experience in portfolio management
- 5+ years of experience in the financial industry including insurance and wealth management.
- Author of “Corporate Governance of External Asset Managers in Switzerland and Liechtenstein“, DIKE Verlag 2021.
- Various positions at Start GLOBAL—Europe's largest student led innovation event.
- Former Board Member of the Alumni Association of the NKSA.

## Meet our Team



### **Julia Fernandez**

**Managing Partner**

Contact: [jf@whvp.ch](mailto:jf@whvp.ch)

[LinkedIn Profile](#)

### **Profile**

Julia Fernandez has over 30 years of experience in the financial industry, 18 years of which have been at WHVP. She manages accounts of international clients with respect to international diversification and is specialized in individual retirement accounts (IRAs) and compliance considerations.

### **Qualifications**

- Swiss Banker's Diploma
- Currently Obtaining her Certificate as Wealth Management Adviser
- Fluent in English, Spanish, French, Italian Swiss-German, and German

### **Experience**

- 30+ years of experience in the financial industry
- 18+ years of which spent guiding and fostering clients with their portfolios at WHVP.
- 9 years spent as a manager at one of the leading Swiss private banks.
- 6 years experience in private banking compliance.
- 4 years experience in private banking for wealth managers.

## Meet our Team



**Dr. iur. Daniel Koller**  
Head of Legal & Compliance  
Contact: [dk@whvp.ch](mailto:dk@whvp.ch)  
[LinkedIn Profile](#)

### Profile

Daniel heads the compliance of WHVP with respect to U.S. and Swiss law, ensuring our clients, custodial banks, business partners, and company activities are in line with the regulatory bodies. He ensures that our clients and business actions comply with both U.S. and Swiss supervisory authorities.

### Qualifications

- Doctor of Law (J.D.), Cybercrime. From the University of Zürich
- Master of Law (LL.M.), Bilingual Studies (German and French)
- Fluent in English, Italian, French, Swiss-German, and German

### Experience

- 20+ years of experience in the financial industry
- 6 years of which as the Head of Legal & Compliance and COO of one of the leading life insurance companies.
- Founder and Managing Partner of 1291 Group Services Ltd.
- Chairman of Lukida G9 Ltd.
- Vice-President of the Board of Liechtenstein Insurance Brokers Association.

# Meet our Team



**Jess Roberson**  
**Executive Assistant**  
Contact: [jr@whvp.ch](mailto:jr@whvp.ch)  
[LinkedIn Profile](#)

## Profile

Jess is fresh to the WHVP team and brings ten years of experience working with client relation services from various fields. He will be providing support to the managing partners in administration, marketing, and investment research tasks.

## Qualifications

- Bachelor of Science, Finance and International Business
- Associate of Science, Business Administration
- Fluent in English, Swiss-German (conversational), and German (conversational)

## Experience

- 4 years of experience managing various facilities and their project teams in both the NGO sector and for a private real estate company.
- 10 years experience in the NGO and professional workplace in 4 different countries and worked on projects in 7 countries.
- Conducted and Supervised a school for NGO workers.

## Contact us

If you have any more questions about us or how we can partner with you, please do not hesitate to contact any of our team members.

If you would like to obtain a **free copy of “Swiss Money Secrets”** make sure to email us about getting your digital copy.

For even more information on us, check out our website and social media pages.

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Email: [info@whvp.ch](mailto:info@whvp.ch)

Phone: +41 44 315 77 77

[WHVP's Blog](#)

[Swiss Wealth Management Talk Podcast](#)

[Our YouTube Channel](#)

Our [LinkedIn Page](#)

Our [Facebook Page](#)

Our [Instagram](#)





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