



Based in Geneva, HBS is a family office, Swiss and independent. We offer our clients tailor made services covering investment advice and global wealth administration. HBS is a member of the Swiss Asset Managers Association.

WHO ARE WE?

Our values.

Our values are independence, transparency and discretion. Having extensive experience in banking and finance we provide our services in a most professional manner. We offer you serious attention and personalised solutions. Our goal is to build a long term relationship with you.

Our mission.

The HBS team undertakes to permanently place you at the centre of its concerns so that you receive the attention that you deserve and which for us is the only guarantee of the highest quality of service.

OUR TEAM

Our professionals

The team has been built over the years around professional staff with banking, accounting and financial experience. They are at the exclusive disposal of our clients to monitor their investments and assist them with their administration and Family Office needs.

Specific resources are dedicated to corporate services, accounting, reporting and to the family office services.

HBS constantly strives to strengthen the team and ensures on-going training for all members.

Our partners

Throughout their career with one of the leading international banks the partners have always been firmly client orientated. They bring you their broad experience, a strong capacity to listen to and understand your needs and problems with a view to bringing you the appropriate answers and solutions.

The partners sit on the boards of different companies active in services, finance and industry.



ASSET MANAGEMENT

HBS is organised to cater for your needs in asset management.

Following a detailed discussion that will enable us to understand what your needs are we will propose to you an investment portfolio that in our opinion best meets your expectations in terms of risk and return.

Our team monitors your portfolio on a systematic basis and provides you with clear and concise updates.

What are the guidelines for our asset management?

We control risk strictly through an organised screening process of the investments. We do not compromise on the quality of investments. We pay due attention to proper risk diversification and systematically manage currency risks.

While managing the risk aspects, we constantly seek to optimize performance.

We regularly provide you with clear and concise reports on the state of your portfolio.

What added value do we bring?

Our independence protects us from pressures and conflicts of interest so that we are free to invest where we identify the best interests of our clients. We have a well-organised investment process and bring our experience and vision to the portfolios.

HBS provides its clients with a dynamic, original, structured and successful investment process.



FAMILY OFFICE

Administrative family office

Based on concrete experience the HBS team can take care of many daily tasks on your behalf within the frame of the administration of your global wealth:

- a. **Banking relationships**
 - Global advice as to your banking relationships
 - Running your banking relationships
 - Opening bank accounts on your behalf
 - Administration of your banking relationships: payments, execution of orders, credit card management
 - Consolidation / restructuring of credits
 - Implementation of private credit facilities
- b. **Monitoring your investment portfolio**
 - Sourcing and appraisal of investment proposals
 - Representing your interests towards asset managers
 - Supervising accounts managed by other managers
 - Evaluating and comparing performance
 - Diagnosis of the overall financial situation
- c. **Personalised reporting and accounting**
 - Private accounting
 - Establishing a financial control panel
 - Consolidation of bank accounts and global wealth
 - Implementation of private budgets
 - Controlling costs and performance
- d. **Concierge services**
 - Hotels – Travel
 - Schooling – supporting children
 - Purchasing, insuring and shipping assets
 - Acquiring and administrating properties
 - Cars
 - Assistance with relocation to Switzerland
- e. **Monitoring insurances**
 - Evaluating a portfolio of insurances
 - Implementing new insurance policies
 - Renegotiating and amending existing policies
 - Life & health insurance
- f. **Administration of projects and assets**
 - Real estate
 - Yachts
 - Planes
 - Art
 - Specific investment projects

Our administrative family office services bring you a central office to which you and your family can turn at any point in time to have your administrative problems solved and dealt with speedily and efficiently.



Strategic family office.

The manner in which you hold your assets is an essential issue in the management of your global wealth.

We are in a position to assist you with the general organisation of your assets and investments.

Working closely with a network of international legal and tax experts we define the best way in which to hold your assets in order to protect them, ensure a smooth transition to heirs and address tax issues.

For complex estates the need may appear to set up a family council to oversee your wealth and to ensure flawless transition. We can help you define the role of the family council, its duties, its members, how it operates and the role that other family members can play.

We assist you in shaping the manner in which to best ensure the protection and consolidation for the future of your wealth and will implement on your behalf the decisions that are taken by you.

Our family office brings to our clients on a long term basis a central office upon which they can rely at all times to address administrative or strategic problems relating to the management of their global wealth.



CORPORATE SERVICES

We incorporate and administer private holding companies as well as family structures such as trusts or foundations.

We incorporate structures in different jurisdictions: European, US or Swiss and other financial centres.

We can keep accounts for the companies and structures that we administer.

At the request of a client, the partners of HBS can act as directors. They also take part in foundation councils or family boards and act as protectors of family trusts or foundations defending the interests of their clients towards third parties.

HBS BANKING PARTNERS

We have negotiated agreements with several leading Swiss private banks as well as top tier international banks.

We can access on your behalf a large network of banking relationships in all main international financial centres.

HBS FEES

HBS applies the following fee structure:

Asset management

Fees are based on a percentage of assets under management

Family office services

Family office services are charged on a time sheet basis or on an annual lump sum basis.

Corporate service

There is a specific fee schedule for corporate services

CONTACT

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