

Price list

My Wealth Office

- Integrated, year-round care of your assets by a personal advisor
- plan. / find. / control.

Assets under advice (million CHF)	1	5	10	20	50	100	500
Annual fee	0.65%	0.40%	0.35%	0.25%	0.21%	0.19%	0.15%
Success base fee model	Request a quote						
Minimum fee	CHF 3'500	Minimum duration		12 months			

Pay per Use

The service elements can be purchased individually and modularly or on an hourly rate. The price depends on the *individual* portfolio size.

Consulting Services / A Wealth Officer handles everything wealth related for you.

Asset size (million CHF)	1	5	10	20	50	100	500
plan.	0.40%	0.20%	0.15%	0.10%	0.08%	0.05%	0.03%
find.	0.50%	0.30%	0.20%	0.15%	0.10%	0.08%	0.06%
control. (p.a.)	0.55%	0.35%	0.25%	0.17%	0.12%	0.09%	0.07%
Portfolio analysis CHF/portfolio	1'600	3'500	5'000	7'600	10'000	12'000	25'000
cost control. CHF/portfolio	1'600	3'500	5'000	7'600	10'000	12'000	25'000
Project work	hourly rate CHF 400 / day rate CHF 3'000 / +expenses at cost						
Minimum fee (plan., find. or control.)	CHF 3'500						

Important: ZWEI Wealth does not receive any retrocessions from asset managers, banks or other financial service providers.

All information are non-binding price recommendations without VAT. Please refer to a ZWEI expert for a offer specific to your case.