

Vorlage plan.

Mein Anlagereglement

Anlageziele

- 1.
- 2.
- 3.
- 4.

Details

Portfoliostruktur

Portfolio 1

Portfolio 2

Portfolio 3

Portfolio 4

Präferenzen

Zu bevorzugen:

Zu vermeiden:

Liquiditätsplanung

Kommendes Jahr:

2-5 Jahre:

5-10 Jahre:

Rollen & Verantwortlichkeiten

Anleger:

Berater:

Verwalter:

Bank(en):

Mitglieder Anlagekomitee:

Nächste Termine

Datum:

Thema:

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