

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.

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. CHF/portfolio	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.