

## **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 0.40% Annual fee 0.65% 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 hand	les everything wealt	h related for you.
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n CHF)	1	5	10	20	50	100	500
	0.40%	0.20%	0.15%	0.10%	0.08%	0.05%	0.03%
CHF/portfolio	0.50%	0.30%	0.20%	0.15%	0.10%	0.08%	0.06%
	0.55%	0.35%	0.25%	0.17%	0.12%	0.09%	0.07%
CHF/portfolio	1'600	3'500	5'000	7'600	10'000	12'000	25'000
CHF/portfolio	1'600	3'500	5'000	7'600	10'000	12'000	25'000
hourly rate CHF 400 / day rate CHF 3'000 / + expenses at cost							
	CHF/portfolio	0.40%  CHF/portfolio 0.50%  0.55%  CHF/portfolio 1'600  CHF/portfolio 1'600	0.40%         0.20%           CHF/portfolio         0.50%         0.30%           0.55%         0.35%           CHF/portfolio         1'600         3'500           CHF/portfolio         1'600         3'500	0.40%         0.20%         0.15%           CHF/portfolio         0.50%         0.30%         0.20%           0.55%         0.35%         0.25%           CHF/portfolio         1'600         3'500         5'000           CHF/portfolio         1'600         3'500         5'000	0.40%         0.20%         0.15%         0.10%           CHF/portfolio         0.50%         0.30%         0.20%         0.15%           0.55%         0.35%         0.25%         0.17%           CHF/portfolio         1'600         3'500         5'000         7'600           CHF/portfolio         1'600         3'500         5'000         7'600	0.40%         0.20%         0.15%         0.10%         0.08%           CHF/portfolio         0.50%         0.30%         0.20%         0.15%         0.10%           0.55%         0.35%         0.25%         0.17%         0.12%           CHF/portfolio         1'600         3'500         5'000         7'600         10'000           CHF/portfolio         1'600         3'500         5'000         7'600         10'000	0.40%         0.20%         0.15%         0.10%         0.08%         0.05%           CHF/portfolio         0.50%         0.30%         0.20%         0.15%         0.10%         0.08%           0.55%         0.35%         0.25%         0.17%         0.12%         0.09%           CHF/portfolio         1'600         3'500         5'000         7'600         10'000         12'000           CHF/portfolio         1'600         3'500         5'000         7'600         10'000         12'000

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.