

BUILDING BEST SOLUTIONS FOR MULTI-NATIONAL, MULTI-JURISDICTIONAL CLIENTS

Tom Burroughes, Group Editor at *WealthBriefing*, talks to Pierre Gabris, Founder & Managing Partner, **Alpen Partners**.

Alpen Partners is an independent wealth management company founded by Pierre Gabris, with 17 partners and a growing, supporting staff of 16. We provide Swiss-based, wealth and asset management services to HNW individuals and ultra-HNW individuals from around the world.

What sets you apart from your peers this year and why?

We have grown significantly, welcoming five new partners mostly covering the LATAM and American markets where we see a strong potential. Alpen Partners International is registered with the Securities and Exchange Commission as an investment advisor and welcomes American clients domiciled in the US and abroad. We have a desk for successful entertainers and professional athletes, which have special needs regarding their present and future financial well-being. We have offices in Bäch/Wollerau (headquarters), Geneva, Locarno, and Zurich.

How have your colleagues contributed towards the success of your organisation?

Our partners are entrepreneurs and their entrepreneurial spirit is catching! Each has specific areas of competence and we can count on each other to collaborate to develop the best solutions for our multi-national, multi-jurisdictional clients.

What are you going to do to stay on the front foot in a fast-growing but also challenging region such as this?

Our clients have high expectations and we aim to deliver more than we promise. As an independent wealth and asset manager we have a fiduciary obligation to put our clients' interests before our own and our disciplined and streamlined, yet individualised, approach keeps our clients satisfied.

What have been the challenges you have had to overcome to reach such a standard?

Onboarding new partners and employees always requires a high level of acceptance and flexibility and a commitment to upscale at every level.

How has your business and business model reacted to the pandemic?

Reacting to the pandemic proved that we have all the moving pieces in place to assure an uninterrupted service for our clients, many of which are abroad and experienced worse conditions than we did in Switzerland.

What lessons have been learnt that can be carried forward?

Listening to our clients' additional concerns during the pandemic became very important, as wealth structuring for the next generation, citizenship and residence planning, and holding assets in the resilient environment of Switzerland became more sought after.

Have your differentiators become more important to your business? Are they still relevant?

In light of increased AI and roboadvisors, we prefer the personal, individualized approach to creating solutions for our clients' often complex international investment needs...we do not have an off-the-shelf mentality.

Has morale amongst your colleagues held up well during the pandemic? What have you done to bolster their spirits?

As we were less affected by shut-downs, had no curfews and no stay-at-home orders our flexible and optimistic colleagues handled the crisis well.

What are the prospects for wealth management in the future bearing in mind a new social and economic environment ahead?

Wealth structuring is as important as wealth and asset management. In many cases, wealth preservation takes the front seat. Involving the next generation has also gained in importance. Overall the



Pierre Gabris
Founder & Managing Partner,
Alpen Partners

motto is, "Be prepared" for unexpected and changing circumstances.

Whom do you look to for inspiration and ideas?

We look to our multi-cultural colleagues of all genders and ages. Anyone can bring forth ideas, which we discuss. Inputs from our clients inspires us to develop our offering even further to accommodate their growing needs.

What do you hope will be the result of receiving this accolade? How does it help your business in this region?

We are proud and honoured to receive not just one but three accolades, as a recognition of our concentrated efforts to provide services of excellent quality to increasingly sophisticated clients in an ever-changing environment. ■

