

# Grüezi and Welcome

Weber Hartmann Vrijhof & Partners





*WHVP*

Your hard-earned wealth in the U.S. is exposed to various risks such as frivolous lawsuits, currency depreciation, a lack of international investment opportunities, and insufficient privacy protection.





*WHVP*

Internationally diversifying your wealth tackles those risks and can help you sleep better, knowing your wealth is safe and sound.

It will allow you to spend less time and energy worrying and give you the freedom to do the things you love.



Diversifying your wealth outside of your home country can be achieved in four easy steps from the comfort of your home:

- 1 Schedule a free 45-minute consultation
- 2 Provide and complete the documents for the account
- 3 Wire the funds to your offshore account
- 4 Have the initial investment meeting and stay in touch



## Benefits of Offshore Banking

- True international wealth diversification
- Protection against a sinking domestic currency
- An added layer of asset protection
- Enhanced privacy protection
- Economic stability



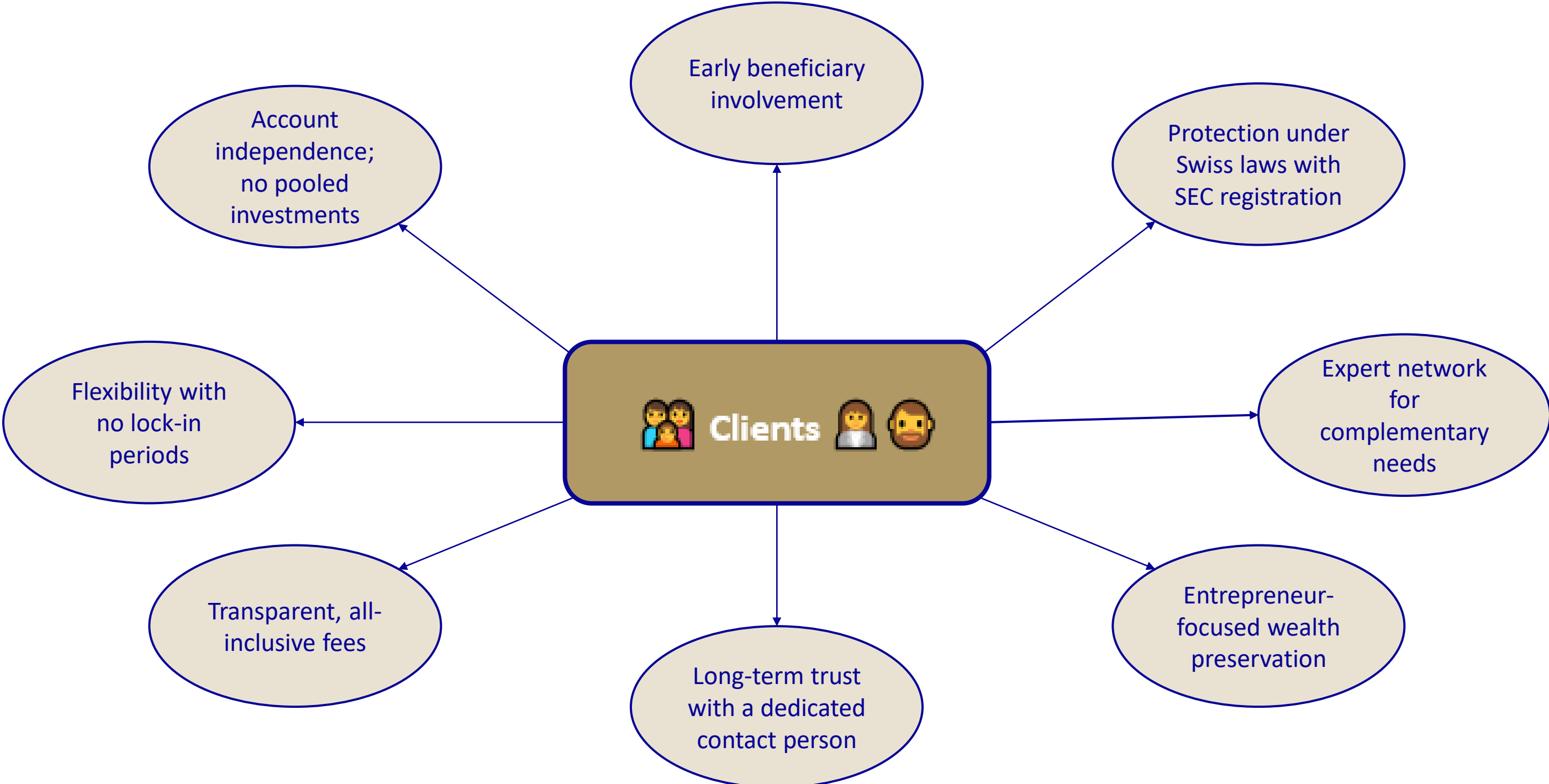


## Benefits of Switzerland

- Longest track record in private banking
- Global leader in cross-border wealth management
- Economic stability & political neutrality
- Low government debt
- Highest standards for data protection and cyber security



# Our Client Satisfaction Promise





## Who We Are

A family owned, Swiss-based independent asset manager specialized in helping U.S. clients move and invest their wealth offshore.

Over the past three decades, we have guided hundreds of clients to navigate the world of offshore banking.

We are not just compliant with Swiss law but also registered with the U.S. Securities and Exchange Commission.

We were even crowned [2021's Best Service Offering for North American Clients](#) by Wealth Briefing.





## Conditions

### Fees

Minimum Investment Volume	USD 500,000
Management Fee p.a. (up to \$5M)	1.5%
Management Fee p.a. (over \$5M)	Negotiable
Minimum Fee per Year	CHF 8,000
Banking Fee	Depends on Bank

### Services

Tailor Made and Individualized Strategy
Bi-Quarterly Market Report and Analysis
Up to Quarterly Portfolio Discussions
Quarterly Bank Reports and Yearly Tax Statements
Online Banking Access





## Investment Philosophy

Our investment philosophy is structured to insulate against U.S. dollar depreciation yet capitalize on overseas investment opportunities. We invest directly in equities, bonds, foreign currencies, and precious metals.

Upon explicit request we can also include various crypto currencies into the portfolio.

We apply strict and conservative asset management principles and exclude USD investments. Our investment approach focuses on regions, countries, and their corresponding stable and promising industries when researching investment opportunities.

One of our main targets is capital preservation as well as ensuring a personalized service suited to your particular situation and needs.





## **Jamie Vrijhof-Droese** Managing Partner

Jamie is a cross-border wealth management expert, public speaker, and author. She heads the business development of WHVP and advises a group of international clients concerning international diversification and asset protection.

### **Qualifications**

- MBA from the University of St. Gallen
- Bachelor of Science in Banking and Finance from the Zurich University of Applied Sciences
- Fluent in English, Swiss-German and German



## **Urs Vrijhof-Droese** Managing Partner

Urs is an expert in the corporate governance of external asset managers. He heads WHVP's investment committee and advises a group of international clients concerning international diversification.

### **Qualifications**

- Chartered Financial Analyst (CFA) Level I
- Master in Law and Economics from University of St. Gallen
- Fluent in English, Swiss-German, and German



## **Julia Fernandez** Managing Partner

Julia has over 30 years of experience in the financial industry, 20+ years of which have been at WHVP. She manages accounts of international clients with respect to international diversification and is specialized in individual retirement accounts (IRAs).

### **Qualifications**

- Swiss Banker's Diploma
- Fluent in English, Spanish, French, Italian Swiss-German, and German





**Jess Roberson**  
**Junior Relationship Manager**

Jess brings ten years of experience in client relationship management from various fields. He supports the head of the investment committee with investment research and advises a group of international clients. He is also involved in our strategic communication.

### Qualifications

- Bachelor of Science, Finance and International Business
- Associate of Science, Business Administration
- Fluent in English, Swiss-German, and German



**Dr. iur. Daniel Koller**  
**Head of Compliance and Risk**

Daniel heads the compliance, ensuring our clients, custodial banks, business partners, and company activities are in line with the regulatory bodies. He ensures that we comply with both U.S. and Swiss supervisory authorities.

### Qualifications

- Doctor of Law (J.D.), Cybercrime. From the University of Zürich
- Master of Law (LL.M.), Bilingual Studies (German and French)
- Fluent in English, Italian, French, Swiss-German, and German



**Robert Vrijhof**  
**Founder and Advisor**

In 1991 Rob co-founded WHVP. He managed the company for almost 30 years and decided to retire from the operative business at the end of 2020. He remains a trusted mentor and adviser to the current management team.

### Qualifications

- Fluent in English, Dutch, Swiss-German, and German





Email us today for a free 45-minute consultation:

**[info@whvp.ch](mailto:info@whvp.ch)**