



advisory services

portfolio management

corporate finance

2010



Independent for our clients, since 1947.



Become acquainted with us ...



... independent, personal, comprehensive.

Independent for our clients, since 1947.



Pascal Böni
Chairman of the Board & CEO



François Péclard
Head of Advisory Services



Hans Brenneis
Head of Portfolio Management



Fred Heintelmann
Head of Corporate Finance

Independent solutions for your entire wealth portfolio

Our independence is reflected in the provision of our services. Who will represent your interests in an independent, personal, and comprehensive manner? With whom can you speak regarding all financial aspects of your company or your private financial situation? The thorough, well-founded dialogue and the personal dedication of our staff form the basis upon which we build our services.

Our 60 years of tradition commit us to think and act with a long term perspective for our clients. We stand at your side throughout the years. Thus, we have grown into one of the

leading bank-independent financial services firms in the northwest region of Switzerland. Through our approximately 60 staff members in the three divisions of Advisory Services, Portfolio Management and Corporate Finance you will receive, from one convenient location, personal and independent solutions suited to your financial requirements.

We look forward to becoming acquainted with you in a personal discussion.

- *Comprehensive family office services for wealthy individuals, company owners and their families*
- *Comprehensive financial advisory for small and medium-sized enterprises and their owners*

Advisory Services

International Trust Ltd



François Péclard



Michael P. Bächli



Gian Barth



Andreas Bodendiek



Jessica Bruderer



Andrea Garnitschnig



Nicolas Gross



Patrick Keck



Christopher Langloh



Roger Leisinger



Lukas Neubauer



Philipp Rieder

Independent solutions for your trust-related requirements

Liquid asset components (bankable assets, such as shares, bonds, etc.) and illiquid asset components (non-bankable assets, such as company equity stakes, real estate assets, etc.) must be actively managed. Here we collaborate closely with our colleagues in the Portfolio Management and Corporate Finance divisions.

Through professional and anticipatory tax and legal advice, proper accounting, and the auditing or founding and administration of companies or structures, you can protect your private or company wealth. For more than 60 years we have provided a complete scope of

financial services in assuring the long term protection of your investments.

- *Tax advisory*
- *Legal advisory*
- *Accounting*
- *Administration of companies*
- *Real estate services*
- *Auditing*

Portfolio Management

itag Portfolio Management Ltd



Hans Bremeis



Pascale Borer



Oliver Eckerlin



Rolf Güdemann



Gergely Karacsony



Renato Sanvido



Christoph Sommer

Independent solutions for your investments

Our core competency is the active management of liquid asset components traded on the stock market (bankable assets). We differentiate ourselves from the competition through the various advisory and fee models offered, but also through complete independence and neutrality in the selection of optimal investment or investment products for you. In this way, we are able to implement the optimal investment and risk strategy most suited to your circumstances. Important for us are your long term interests and your long term portfolio performance, whilst keeping in mind your personal risk and wealth situation. The latter also includes enga-

ging the knowledge of our colleagues within the group in the areas of Advisory Services and Corporate Finance. Thus we support you, for example, in the sale of a family business or your real estate in Switzerland or internationally as effectively as in the reinvestment of the resulting assets received, and do so in accordance with your risk and personal life objectives. As a securities dealer under the Swiss Financial Market Supervisory Authority (FINMA), we fulfil the highest standards of professionalism and discretion on these assignments.

- *Wealth management and advisory*
- *Investment controlling*

Corporate Finance

Remaco Merger Ltd



Fred Heinzelmann



Pascal Böni



Sara D'Ascanio



Georg Fankhauser



Rudolf Graf



Michael Hohn



Imre Kostyák



Arndt Oelgarth



Daniel Schmidt



Jean-Jacques Zwicky

Independent solutions for your company equity stakes

An important asset component held by wealthy private clients is their own company. Since 1969 we have been active in the field of Corporate Finance for small and medium-sized firms. We look after this segment of your wealth and consider this to include not only the project-specific corporate – finance – work.

Within the group we have available all relevant tax, legal, accounting and auditing knowledge (Advisory Services), as well as the competency to analyse the development of your wealth against a background of long term financial planning (Portfolio Management). Our more

than 40 years of competency in investing in or the sale of illiquid asset components (non-bankable assets) make us a preferred discussion partner for many entrepreneurs and company owners in Switzerland.

Company successions, management buy-outs (MBOs) and management buy-ins (MBIs) are a segment of our core business, supplemented by advice in miscellaneous financing issues.

- *Mergers & acquisitions*
- *Succession planning & company sales*
- *MBOs & MBIs*
- *Growth financings*
- *Company valuations*
- *Due diligence services*
- *Valuation services*
- *Private equity management*

