

**Our DNA**  
is to take care of your future



# Summary

3

## **TELOMERE CAPITAL**

A story built on the spirit of performance

A long-term vision

The keys to success

The spirit of collaboration

5

## **OUR MODEL**

The Client

Telomere Capital

The Bank

Transparency and pricing

7

## **WEALTH MANAGEMENT**

Understanding who you are to serve you better

A rigorous investment process

Strategic allocation and active management

Tailor-made management

9

## **FAMILY OFFICE**

Operational management

Personalized reporting

Financial planning

Family governance

Intergenerational transmission

Philanthropy

11

## **ADDITIONAL SERVICES**

Wealth structuring and retirement planning

Tax optimization

Consolidated reporting

Dedicated services for entrepreneurs, senior executives and women investors

Relocation





# TELOMERE CAPITAL

## **A story built on the spirit of performance**

The founders of Telomere Capital met within the Private Banking department of a prestigious Swiss bank. In 2015, they decided to create an independent wealth management structure, driven by a shared ambition: reinventing their profession around a true “spirit of performance.” This unique vision of wealth management, focused on excellence and innovation, has enabled Telomere Capital to exceed all its growth forecasts and earn its position among the sector’s leading players.

As a boutique firm, we have chosen to focus our expertise on a limited number of clients, ensuring top-tier service built on discipline, quality and personalization. Every member of our team contributes directly to the company’s growth. Through efficient processes and the use of cutting-edge technologies, we deliver rigorous analysis of your assets, optimize the performance of your wealth and guarantee personalised follow-up.

Our approach has proven successful: our growth is perfectly aligned with our principles of excellence and selective client onboarding. We firmly believe that a satisfied client remains loyal and becomes an ambassador for our services.





### **A long-term vision**

Our corporate culture aims to generate sustainable value by relying on the experience and unique skills of our team. We bring together experts in wealth management, investment specialists, financial planning advisors, and professionals dedicated to client support and digital transformation.

Beyond our technical expertise, our strength lies in a deeply human and personalised approach. We build authentic relationships to deliver truly bespoke advice.

### **The keys to success**

Our success stems from the right balance between professional expertise and human connection, giving each client relationship a unique dimension.

#### **A desire to excel**

We bring dynamism, energy and proactivity to every client interaction.

#### **A performance-driven culture**

We continuously seek investment opportunities that protect and sustainably grow our clients' wealth.

#### **An entrepreneurial mindset**

We maintain full independence and nurture trust-based relationships, grounded in absolute availability.

### **The spirit of collaboration**

We provide high value-added wealth management and financial advisory services with the goal of offering a personalised and exceptional experience. Collaboration is central to our approach. Understanding your situation, analysing your needs and anticipating your long-term objectives are the foundations of our solutions. Your priorities are at the core of our thinking in order to offer you tailored investment strategies.

Whether you are an individual, entrepreneur or family, every journey is unique. That is why we design dedicated strategies in wealth management, Family Office services and financial planning, enabling you to focus fully on your projects, your family and your ambitions.



# OUR MODEL

## The Client

The client opens an account with a custodian bank and grants Telomere Capital a limited management mandate. This mandate is strictly regulated and never allows the independent manager to withdraw funds or securities.

## Telomere Capital

As an independent asset manager, Telomere Capital is responsible for managing the client's accounts. This relationship is built on close collaboration: together with their manager, the clients define their risk appetite and investment policy. We then implement a management strategy aligned with these parameters and provide regular reporting on results, ensuring total transparency.

## The Bank

The bank plays a central role in the administrative management of client accounts. It is responsible for the safekeeping of securities, the settlement of transactions, income collection and corporate actions. It also handles transfers and cash withdrawals, mail processing and administrative reporting. It provides secure online access, allowing clients to monitor their accounts at any time.

Clients may contact the bank at any moment for questions or additional instructions.

Our model enables you to benefit from flexible and tailor-made solutions. With a single point of contact, we optimize the entire value chain to meet your highest expectations.

## Transparency and pricing

At Telomere Capital, transparency is a priority. From our first meeting, we present a detailed overview of all pricing components: management fees, banking fees and fees related to family office services. We work closely with you and with our partners in full clarity to build a long-term, trust-based relationship.

## Our added value

- A personalised advisory approach
- A stable and long-lasting relationship
- Permanent availability
- Tailor-made management solutions
- A robust investment process
- Clear and transparent pricing







# WEALTH MANAGEMENT

Do you aspire to wealth management that reflects your ambitions and goes beyond standardised banking offerings?

As specialists in private wealth management, we design tailored investment strategies aligned with your highest expectations.

## **Understanding who you are to serve you better**

At Telomere Capital, we map your situation to shape a solution entirely dedicated to you. A thorough analysis of your personal, family and professional needs, combined with your risk tolerance, reference currency and investment horizon, allows us to design the right investment strategy.

We ensure rigorous follow-up, continuously adjusting your strategy in line with your personal developments and market dynamics.

## **A rigorous investment process**

We base our decisions on in-depth analysis and insights from top financial experts.

Our portfolio monitoring is strict: we adjust positions according to market movements and client objectives.

Risk management is at the heart of our process and guides all investment decisions. This offers a double benefit: maximum protection for your capital and strong long-term performance.

Technology is central to our work. We integrate all management processes into advanced platforms, ensuring a modern, efficient and forward-looking organisation. We use risk-management tools that track performance, developments and market impacts in real time.



### **Strategic allocation and active management**

Our approach combines long-term strategic allocation with active investment management. This allows us to identify the best sectoral and geographical opportunities while maintaining tight risk supervision.

*“Understanding who you are, assessing your immediate needs and analysing your long-term goals form the basis of all our management solutions.”*

### **Tailor-made management**

We offer total flexibility: discretionary management or investment advisory, depending on your preferences and desired level of involvement. Our recommendations and allocations are designed to match your profile and your wealth objectives.

Through our structure, clients also benefit from privileged access to exclusive investment opportunities.





# FAMILY OFFICE

The Telomere Capital Family Office supports you in managing and preserving your wealth, combining financial strategy with family cohesion. We coordinate all aspects of your wealth: financial and operational management, estate planning, family governance and philanthropy.

## Operational management

### *Delegation of administrative tasks and rigorous cash-flow supervision*

Whether handling payments, managing family expenses or processing complex financial operations, our team manages all day-to-day administrative tasks. With our middle-office service, you gain a single point of contact to simplify procedures and resolve all administrative matters. To free you from your professional and personal operational burdens, we handle:

Insurance monitoring and optimisation

Search, acquisition and sale of real estate

Support with tax management

Administration and oversight of your employees (contracts, permits, salaries, etc.)

Handling administrative requests

Citizenship and naturalisation procedures

## Personalized reporting

### *Detailed access to all your assets*

If you seek a clear, consolidated overview of your financial situation, we provide reporting that centralises all key wealth information (investments, real estate, private equity, art, etc.). Through detailed reports and the support of a dedicated advisor, you benefit from a complete, strategic vision of your wealth.





## Financial planning

### *Structuring and optimising your wealth*

La structuration de vos avoirs est essentielle. Structuring your assets is essential to meet financial goals while considering your family and personal circumstances. We analyse each component of your wealth to organise it coherently. This approach ensures that your objectives are met while adapting to the specificities of your situation.

## Family governance

### *Awareness and involvement of future generations*

Involving younger generations is essential to ensure continuity and stability of family wealth. Strong governance structures help gather family members around shared values and common goals. Telomere Capital assists you in creating customised governance frameworks to consolidate your legacy and guide future generations.

## Intergenerational transmission

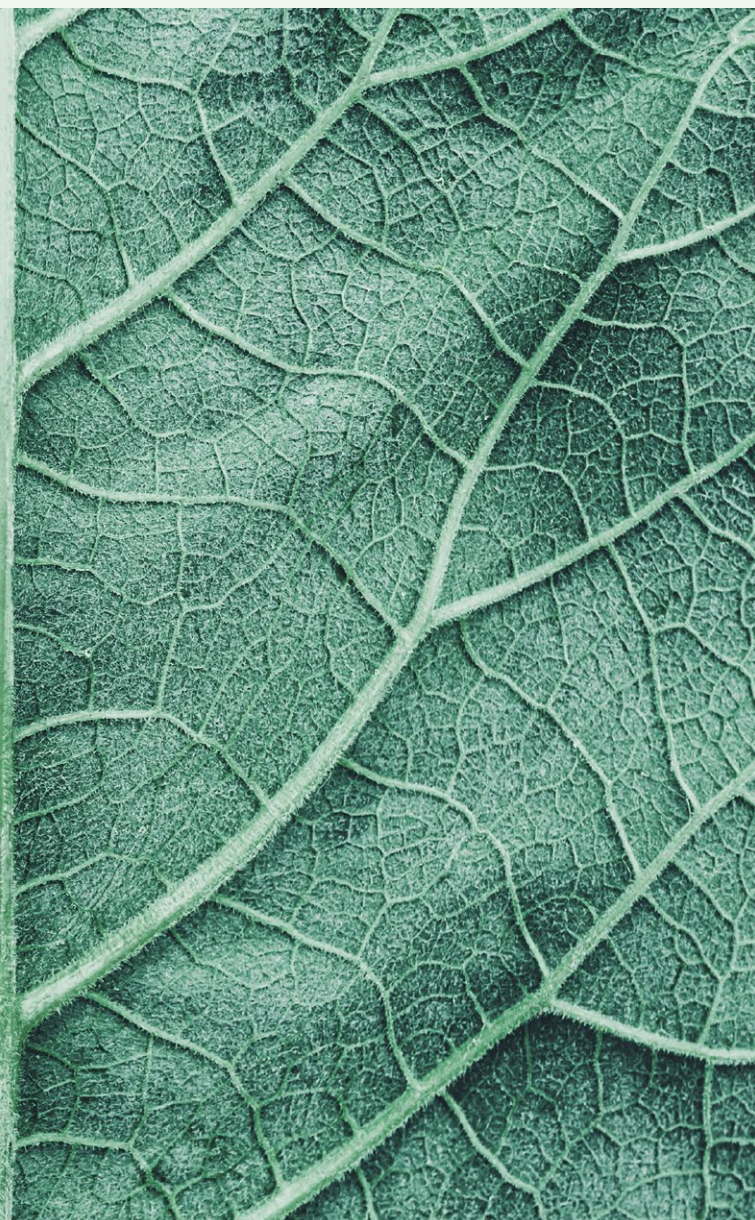
### *Organisation and support to ensure the continuity of your heritage*

Intergenerational transmission is a complex process requiring rigorous preparation and long-term vision. Telomere Capital guides families in educating and involving future generations to ensure smooth transitions aligned with their values.

## Philanthropy

### *Structuring and implementing your philanthropic projects*

If you wish to bring a philanthropic project to life, Telomere Capital assists with structuring and execution, integrating your values, aspirations and vision to maximise the impact of your generosity.



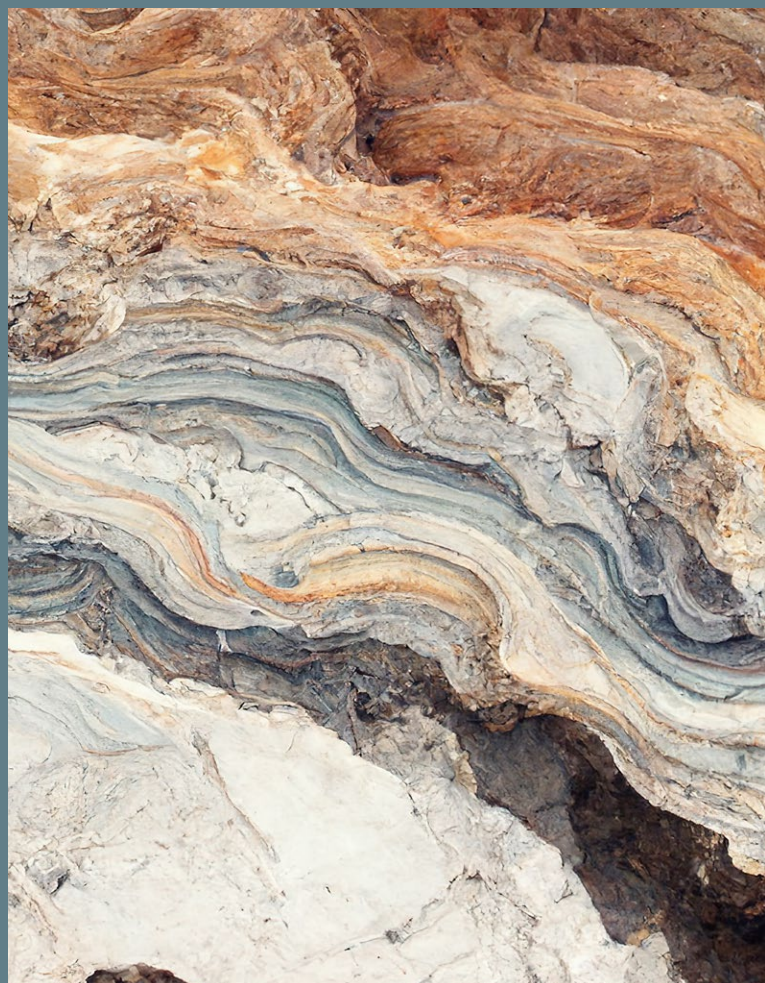


# ADDITIONAL SERVICES

At Telomere Capital, we place our expertise and commitment at your service to build and sustain your wealth in an environment of trust and exclusivity. Our independence and bespoke approach guarantee solutions fully aligned with your highest aspirations.

## **Wealth structuring and retirement planning**

Planning ahead is essential to ensure financial peace of mind. We guide you in organising and optimising your wealth, preparing for retirement, protecting loved ones, or ensuring long-term asset growth. Through proactive strategies and proven expertise, we turn each life stage into lasting success.



## **Tax optimization**

The tax structure of your wealth plays a crucial role in protecting and enhancing your assets. With tailored tax-structuring solutions, you benefit from an optimal framework to efficiently preserve and grow your wealth. By collaborating with leading experts, we develop tax and financial strategies that match your needs and objectives, whether the aim is to reduce income tax, optimise assets, or prepare donations and inheritance transfers.





### **Consolidated reporting**

Our reports offer a detailed and up-to-date overview of your holdings, helping you quickly identify available liquidity, investments and potential risks related to upcoming decisions. With secure and regularly updated data flows, you benefit from a comprehensive dashboard enabling autonomous monitoring and timely decision-making.

Telomere Capital not only provides powerful monitoring tools but also a single point of contact for all financial questions, ensuring clarity, confidence and strategic decision-making.





### **Dedicated services to entrepreneurs, executives and women investors**

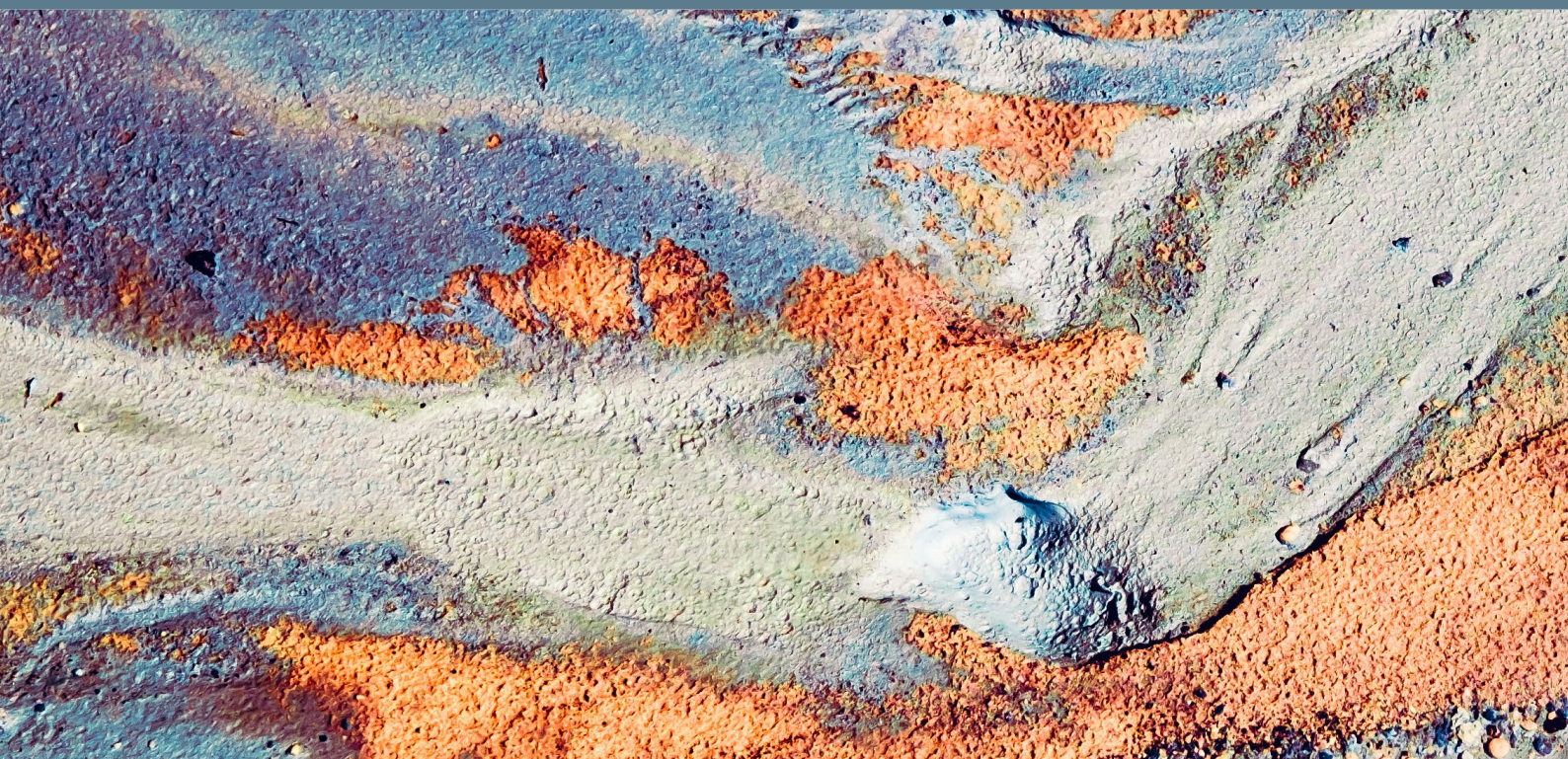
We understand the specific challenges faced by entrepreneurs and business leaders, particularly regarding the management of business and personal wealth. We offer tailored strategies to optimise investments, manage cash flows and secure assets, enabling you to focus on running and growing your company.

Women investors benefit from advisory services adapted to their priorities, such as responsible investing, wealth protection and family succession planning.

### **Relocation**

Moving to a new country involves complex administrative and financial challenges. Telomere Capital supports you at every stage to simplify your relocation and that of your family, offering full assistance: housing search, permits, administrative procedures, school integration and financial/tax structuring.





[www.telomere.ch](http://www.telomere.ch)