中型独立财富管理集团

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TARGET PRICE

$ 200,000,000

GROSS REVENUE

$ 0

EBITDA

$ 0

BUSINESS TYPE

金融服务

COUNTRY

瑞士

BUSINESS ID

L#20261114

简介：

一家历史悠久的瑞士私人银行及财富管理集团，其客户群规模远超传统精品银行，且采用以国际业务为重点的商业模式。

- 集团管理资产规模：约50亿至90亿瑞士法郎
- 净新增资金（最新财年）：正数，低三位数百万瑞士法郎
- 机构规模：远大于一家小型私人银行
- 收入模式：主要来自管理费、咨询费和托管费等经常性收入
- 资本与流动性：实力雄厚且管理审慎

业务模式：

私人银行、财富管理、投资咨询、家族办公室式服务、伦巴第贷款，以及面向外部资产管理人的服务。

该瑞士银行平台还辅以精选的国际合作关系、投资项目以及本地合作伙伴关系。

客户群体：

国际高净值人士（HNWIs）和超高净值人士（UHNWIs）、企业家家族、家族办公室、独立资产管理机构以及部分机构投资者。

该平台在多个国际目标市场拥有深厚的专业经验。

投资案例：收购一家规模可观的瑞士财富管理平台的难得机遇。

特别适合希望不仅获得银行牌照，还希望获得成熟国际品牌的外资私人银行、区域性银行集团或长期金融投资者。

通过收购团队以及整合更多客户投资组合，可以实现进一步的增长。

独立财富管理集团是瑞士金融业中增长最快的领域之一，这得益于全球对独立投资咨询和多家族办公室服务需求的不断增长。

瑞士在资产保护、专业的投资知识以及国际客户服务方面的声誉，持续吸引着高净值和超高净值人士。

由于具备可扩展性、持续的费用收入以及国际分销能力，管理着数十亿瑞士法郎资产的平台已成为越来越有吸引力的收购目标。

请注意，关于机密交易详情的咨询和请求，只有在收到完整的“ ” **KYC** 合规文件包后，才会予以考虑。

所有提交的材料若要接受评审，必须包含以下文件：

- —**NDA**已正式签署
- —**POF**近期银行信函、对账单或同等效力的证明文件
- **/**
- ——已签署的代理授权书

不完整的申请或未附带所需验证文件的申请，将一律不予受理。

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不完整的申请或未附带所需验证文件的申请，将一律不予受理。

- 任何交易服务的代理和执行，均严格以签署完整的《买方委托书》为前提。
在所有各方正式签署该授权书之前，双方之间不存在任何咨询、代理或受托关系。

- **“ ” KYC POF**

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