



FIDLEG & FINIG - an opportunity for Swiss wealth managers with the right partner

The new regulation is not yet a reason to give up one's business and life's dream!

We offer a platform for wealth managers whose clients remain in the foreground. With access to tailor-made solutions, a modern infrastructure and facilitated direct access to leading Swiss custodian banks, wealth managers are given the opportunity to ensure the continuation of their business activities even after FIDLEG & FINIG. As a partner of Reuss Private, wealth managers can benefit from the advantages of a

state-of-the-art infrastructure including a transparent succession plan (earn-out model). In addition, with our support, we assist with the registration in the Advisory Registry whilst still being able to use our infrastructure in one's own name and brand. A European market entry with active support of EU clients is only one of many further options.





FIDLEG & FINIG - an opportunity for Swiss wealth managers

New regulation is no reason to give up!

With the increased administrative requirements under FIDLEG & FINIG, many wealth managers in Switzerland are faced with the question of ceasing their business activities. Client relationships built up over many years suffer the most. We would like to offer a reasonable alternative and have therefore developed two approaches in consultation with the largest Swiss custodian banks:

Direct entry at Reuss Private AG: As a partner of Reuss Private, you will have full access to our infrastructure and, with our FINMA securities dealer license, you can continue to conveniently serve your clients without having to incur the additional administrative expense caused by FIDLEG & FINIG.

Reuss Private as your independent advisor: We support you in registering in the advisory registry and in maintaining the necessary systems and structures. You can also benefit from our infrastructure and, thanks to whitelabelling solutions, continue to present yourself in your own look and feel towards your clients.

Both approaches foresee absolute cost transparency thanks to full fee-sharing. The conclusion of costly franchise agreements or equity investments is not necessary. Depending on the model, up to 80% of gross revenues are reimbursed.

We want to take care of the administration so that you can focus on your clients: You get access to an infrastructure with state-of-the-art applications that are specifically designed for the needs of wealth managers.

Functions such as risk management and compliance can be outsourced to us. Anti-money laundering and customer monitoring, including sanction monitoring, are also taken over by us. In addition, solutions for (salary) accounting and commission calculations are taken over.

Use our referral lists and specialised portfolio management tools to generate added value for your clients, always with an eye to meeting legal and compliance requirements.

Because our approach has been developed in cooperation with leading Swiss custodian banks, you can also benefit from their digital account opening and extended product range in the trading area.

With our experience in the cross-border area, and with the help of our MiFID II licensed companies in Germany and relationships with foreign custodian banks, access to the European market can also be ensured for the active support of your clients - always in compliance with the applicable European regulations.

Why Reuss Private?

- Processes and tools specially designed for Swiss wealth managers
- Cost transparency without capital participation
- Transparent remuneration model (up to 80%)
- Direct access to custodian banks
- Whitelabelling solutions
- Cross-border EU market access with MIFID II compliance
- Product recommendation lists

Interested?

Why not write us a message at

info@reussprivate.com

or visit our website reussprivate.com