Private Client Partners
Family Office Services
Banque Bonhôte & Cie AG

Private Client Partners

Banque Bonhôte & Cie SA

Our story

Private Client Partners was formed in 1998 as a fully registered Swiss bank offering independent family office services for a limited number of families.

We make it our personal business to take care of the affairs of families and private clients with our holistic and contemporary approach to meeting individual needs.

In July 2020, Banque Bonhôte & Cie SA acquired 100% of the former Private Client Partners bank, which went on as an independently run Zurich branch of bank Bonhôte. From there, it continues its dedicated service to the client base of Private Client Partners benefiting from the stability and capital of a 200 years old traditional Swiss private bank. Bonhôte was established in 1815 in Neuchâtel and had no presence in Zurich to that date.

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Why family office service?

We act as the central point of contact for any and all of your issues

What sets the family office concept apart is the wide array of services that it brings together under one roof. We aim to deliver a high standard of quality by combining comprehensive solutions and increased efficiency through reduced frictional losses. In some cases, our clients decide to entrust us with specific remits, and in others they ask us to advise them on and look after their affairs as a whole.

We interact with our clients as personal and independent sparring partners, which puts us in a position to provide the best possible solutions for them. In addition, we have a broad network of specialists whose knowledge our clients can tap into at all times. Private Client Partners offers you the full spectrum of family office services, ensuring that complex family portfolios are managed comprehensively and holistically.

Family office services

Time and space

To invest and manage wealth successfully over the short, medium and long term requires many years' experience and specialist knowledge, plus one other key factor: time. By working together with Private Client Partners, you can free up time and space to focus on other areas that you enjoy or in which you can add value.

Holistic view

Only by taking a holistic view, incorporating all sources of wealth (both listed and unlisted assets), can we build an effective wealth management plan tailored to your needs.

Support

Private Client Partners can, if you so request, provide support with any and all administrative matters. Examples may include handling payment transactions, cost of living expenses, coordination and compilation of tax documents. We are happy to store these documents centrally, either physically or electronically.

Personal input

Together with you, we devise an individual strategy to meet your expectations and requirements as well as your risk appetite and tolerance. Your personal preferences are accommodated in all the suggestions we make and plans we implement. These elements feed into your own personal portfolio that fits your needs like a glove. During the investment process we track and take steps to ensure your strategy is delivered.

We integrate your existing wealth managers and third-party banks and are happy to negotiate preferential terms with them on your behalf. Private Client Partners monitors and makes constant checks to ensure compliance with the terms of the pre-agreed mandates. In addition, we pay considerable attention to the overall quality of custodians to protect your interests.

Wealth management & advisory for Private clients

The ultimate goal of our activities is to secure and protect your wealth over the long term and comprehensively represent your interests.

Using the scenarios discussed, we define your personalised strategic asset allocation together with you and execute it using all our professional expertise. We develop and incorporate a tactical approach by applying insights from independent research and from extensive monitoring of the markets (macro-analysis, fixed-income, currencies) and geopolitical developments.

These tactics shape either our personal investment recommendations for you (wealth advisory) or the direct action taken upon these (wealth management). We monitor execution to make sure it is in line with the latest market trends. Should the markets move significantly, we keep you extensively informed to ensure that adjustments can be made as rapidly as possible.

Asset consolidation & securities accounting for Private clients

Consideration of all the various aspects of your portfolio forms the basis for the comprehensive (short-, medium- and long-term) wealth planning we do on your behalf. Alongside listed securities, this includes unlisted assets such as shareholdings, real estate, fine art, private equity, venture capital and digital assets.

For over 20 years, Private Client Partners has been consolidating various sources of wealth independently of banks by harnessing the seasoned expertise of its staff. Thanks to its own proprietary software solution, it can provide transaction-based reporting tailored to your specific requirements. We can guarantee you a high level of efficiency and quality thanks to our highly reliable, tried-and-tested processes.

Asset consolidation & securities accounting for Institutionals

Asset consolidation provides asset-related information about all asset classes on a needs-based and timely basis for our institutional client base. For over 20 years, Private Client Partners has consolidated complex asset structures comprising both listed and unlisted assets and presents these on a transaction basis. The software and system solutions we specially developed can consolidate assets flexibly, in a manner tailored to meet individual needs.

Our extensive approval procedures ensure a high standard of data quality. Automated interfaces to various custodian banks are already in place, with the possibility of implementing additional interfaces rapidly at any time.

Upon request, we can create specific management reporting and handle the associated securities accounting.

Private Client Partners

contact@privateclientpartners.ch

Private Client Partners
Limmatquai 26
P.O. Box
8024 Zurich
T. +41 43 244 76 00
privateclientpartners.ch

Certified B Corporation

This company meets the highest standards of social and environmental impact

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