

5 Jahre alte Schweizer Vermögensverwaltungsg (Portfolio).





5 Jahre alte Schweizer Vermögensverwaltungsgesellschaft (Portfolio).

5 Jahre alte Schweizer Vermögensverwaltungsgesellschaft (Portfolio) ansässig in Zürich (Schweiz).

eingezahltes Grundkapital, CHF: 150,000
Regulatorischer Status

- durch VQF (Verein zur Qualitätssicherung von Finanzdienstleistungen) zugelassenes Mitglied
- Der Übergang zu neuen Finanzvorschriften hat begonnen (neue Unternehmen unterliegen dem vollständigen Antragsverfahren bei der FINMA).
- Mitglied der Schweizerischen Ombudsstelle für Finanzen

Bilanz

- Rund 300.000 CHF verwaltet mit 3 Investoren.
- 3 neue Verträge befinden sich kurz vor Finalisierung

Erlaubte Aktivitäten

Vor Ende Mai 2020 registrierte Schweizer Vermögensverwaltungsgesellschaften:

- Erbringung von Dienstleistungen im Zusammenhang mit Zahlungsvorgängen, insbesondere die Durchführung elektronischer Überweisungen im Auftrag anderer Personen, Ausgabe und Verwaltung von Zahlungsmitteln wie Kreditkarten und Reiseschecks;
- Durchführung von Kreditgeschäften (insbesondere in Bezug auf Verbraucherdarlehen oder Hypotheken, Factoring, gewerbliche Finanzierungen oder Finanzleasing);
- Handel auf eigene oder fremde Rechnung mit Banknoten, Münzen, Waren;
- Investitionen als Anlageberater tätigen;
- wie der autorisierte Treuhänder handeln;
- Halten von Wertpapieren in Depots.

Preis beinhaltet auch

- 100 % Anteile;
 - Betriebshandbuch des Unternehmens, das schriftliche Geschäftsverfahren wie den Onboarding-Prozess für Kunden enthält, etc.
 - Musterformulare und Dokumente: Kundenantragsformular, Anlegerprofil, Vermögensverwaltungsvertrag, etc.
 - Professionelles Corporate-Identity-Markenpaket: Logo, Markenmuster, Farbschema.
 - Neues Website-Design bereit für den Start bis Ende Juni.
- Zusätzliche Dienstleistungen verfügbar (gegen zusätzliche Gebühren):
- Benannter Compliance-Beauftragter;
 - Nominierter Vorstand (in der Schweiz ansässig);
 - offizielle Anschrift;

TARGET PRICE
CHF 2,000,000

GROSS REVENUE
TBD

EBITDA
TBD

BUSINESS TYPE
Finanzdienstleistungen

SUPPORT & TRAINING
24 Stunden kostenlos; darüber hinaus - 350 CHF/Stunde

COUNTRY
Schweiz

BUSINESS ID
L#20210102

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