



Double Return for Family Offices

Capital markets play a crucial role – they are intermediaries for capital flows, but also shapers of a viable economy.

Our world is changing at a rapid pace. It is time to move away from outdated business models and invest in innovative technologies. Pioneering technologies offer attractive returns while contributing to our ecological balance and improving the quality of life on our planet.

How to invest in the Future?

Three dimensions are crucial for us:



FIT FOR FUTURE

Our investment strategy empowers you to invest in growth areas while replacing outdated business models. We help you to identify companies that have developed innovative solutions for the key challenges of our time and are thus successfully responding to megatrends.



ESE FOOTPRINT

Preserving a healthy planet for the next generation is one of the greatest challenges of our time – and at the same time one of the greatest investment opportunities. We only invest in companies that our research and investment teams have classified as having a positive impact on our Economy, Society, and Environment.



FINANCIAL QUALITY

An investment is only future-proof if it also demonstrates a strong financial quality. All investments must pass a rigorous financial analysis (e.g. strong balance sheet, sustainable revenue growth, market returns, etc.).

Your Benefits

- + **Wealth Preservation and Growth:** We help you fully understand the impact and return of your investments before taking any investment decisions.
- + **Double Return:** Your wealth generates attractive returns – while simultaneously having a positive impact on our Economy, Society, and Environment.
- + **Radical Collaboration:** Global megatrends present us with complex challenges and require a rethink. We may need a cultural shift in collaboration that goes beyond company boundaries. For us, this means actively sharing our network and expertise with you.



Book an appointment with our Head of Family Office



Our Offering

A wise investment decision is based on expert knowledge, thorough analysis, and a long-term perspective. Allow us to share our in-depth expertise and insights with you, from key megatrends and innovative technologies to the impact of your investments and beyond. That's why we suggest starting your Globalance journey with a complimentary workshop tailored to your individual needs and ideas.



Your Sparring Partner

Behind a successful person is often a strong team. Let us be your strategic partner for investment decisions – guiding you towards opportunities in growth sectors and helping you transition away from out-dated business models.



Your Transparency Tools

Compare your portfolios across different banks using our Manager Comparison Report. Evaluate the level of innovation and impact of your investments in real time with Globalance World.

globalanceworld.com/en



Your Investment Solutions

Generate a double return by choosing one of our Discretionary Mandates or Funds solutions. Both solutions comprise multi-asset-class and pure equity structures (in CHF, EUR, USD).

Who we are?

We are a fully licensed Swiss private bank, founded in 2011, with offices in Zurich and Munich. Our roots go back to 1995, when our founders established SAM, one of the world's leading asset managers for sustainable investments. Four years later they launched the world's first and still leading benchmark for sustainable stocks, together with Dow Jones. In the following years, various first editions of sustainable funds were successfully launched, e.g. in the areas of water, cleantech and climate.

Our USPs

1 Exceptional Stability

Globalance is owner-managed, has a very high Tier 1 leverage ratio (57%) and employees hold 56% of shares.

2 Proven Expertise

With nearly 30 years of experience, we are a pioneer in Sustainable Investing. Strong focus on future viability and positive impact across all asset classes.

3 Maximum Transparency

We are the world's first bank to have developed (i) Globalance World – a digital world map for your investments and (ii) the Manager Comparison Report – helping you to compare portfolios.

Why? Our Mission

We empower clients to successfully invest in innovative companies that solve global challenges and shape a positive future.

Your first point of contact



Talk to us today about the future of your wealth.

Jeannette Varzandeh
Head of Family Office

Phone +41 44 215 55 18
jeannette.varzandeh@globalance.com



Disclaimer This document is for information purposes only. The recipient is recommended to carry out their own assessment, in particular to check the information in terms of its compatibility with their own circumstances and its legal, regulatory, tax and other consequences. This document may not be reproduced in whole or in part without the written permission of the authors and Globalance Bank AG. Copyright © 2024. Globalance Bank AG – all rights reserved.