

Société de Gestion d'Actifs (Portefeuille) Suisse De 5 Ans





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Société de Gestion d'actifs (Portefeuille) Suisse de 5 ans domiciliée à Zurich, Suisse (AG)

Capital social versé, CHF: 150 ' 000

Statut Réglementaire

- Membre agréé VQF SRO
- La transition vers le nouveau règlement financier a commencé (les nouvelles entités sont soumises à une procédure de demande complète auprès de la FINMA).
- Membre du Bureau du Médiateur financier suisse

Bilan

- Environ ' 300 ' 000 CHF sous gestion avec 3 investisseurs.
- 3 nouveaux contrats sont en phase finale.

Activités Autorisées

Sociétés de gestion suisses enregistrées avant fin mai 2020:

- fournir des services liés aux opérations de paiement, notamment en effectuant des virements électroniques pour le compte d'autres personnes, en émettant et en gérant des moyens tels que des cartes de crédit et des chèques de voyage;
- réalisation d'opérations de crédit (notamment en matière de crédits à la consommation ou hypothécaires, d'affacturage, de financement commercial ou de crédit-bail);
- opérations sur son propre compte ou pour le compte d'autrui en billets, pièces de monnaie, matières premières;
- faire des investissements en tant que conseillers en investissement;
- agir comme l'agent d'entiercement autorisé;
- détenir des titres en dépôt.

Le prix comprend également

- 100% d'actions;
 - Manuel d'exploitation de l'entreprise qui comprend des procédures commerciales écrites telles que le processus d'intégration des clients, etc.
 - Modèles de formulaires et de documents: formulaire de demande de client, profil d'investisseur, contrat de gestion discrétionnaire d'actifs, etc.
 - Ensemble de marque d'identité d'entreprise professionnelle: logo, motifs de marque, palette de couleurs.
 - Nouveau design de site Web prêt pour le lancement jusqu'à la fin du mois de juin.
- Services supplémentaires disponibles (moyennant des frais supplémentaires):
- Agent de conformité désigné;
 - Administrateur désigné (résident suisse);
 - Adresse légale;

TARGET PRICE

CHF 2,000,000

GROSS REVENUE

TBD

EBITDA

TBD

BUSINESS TYPE

Services Financiers, Services Financiers

ESTABLISHED

2015-03-09

SUPPORT & TRAINING

24 heures de travail gratuites, toutes au-dessus de-350 CHF / heure

COUNTRY

Suisse

BUSINESS ID

L#20210102

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