



# Helvetia Wealth grows Irish client base

Swiss-based Helvetia Wealth partners with the world's leading investment banks to create the widest range of 100 per cent capital-guaranteed products, covering all markets and asset classes, including equities, commodities and currencies.

This allows its private and institutional clients to protect their portfolios against any losses, while still participating in the upside growth in the markets, wherever it exists.

According to Brent McLean, a managing director of Helvetia, the company hasn't been caught sleeping by the recent volatility in the markets. "We advised clients in September 2007 to move into capital-protected products and commodities. This strategy has allowed our clients to retain their gains amid a volatile market. High volatility is a characteristic of a bear market, yet our Helvetia

**'We offer wealth management to the mid-market'**

Wealth 'Gold Booster' has gained 41 per cent since we designed and launched it in September 2007."

In the context of the Irish market, McLean identifies Helvetia's core strengths as "offering Swiss private banking and asset management and access into institutional products and services not previously available to Irish investors".

The provision of a high quality and focused service is one of Helvetia's key differentials. "We provide personal services utilising our exper-

tise, to create the right products and client portfolios to meet each investor's personal medium to long-term goals. An individual personal adviser is appointed to each investor, to ensure excellent service and advice."

Helvetia Wealth has been attracting a steady flow of Irish investors in recent months, providing these investors with access to institutional banking products from some of Europe's largest financial institutions. "Our 2008 targets are to obtain 500-1,000 new clients in Ireland and increase fresh assets under management to between €250 million and €500 million," said McLean.

"We offer wealth management to the mid-market, as well as high net worth individuals, and our ambition is to present to the Irish marketplace the opportunity to invest alongside the world elite.

We open Swiss bank accounts for all of our clients. The bank accounts double as trading accounts, that give investors access to the institutional investments, as well as listed securities on all global stock exchanges."

Underpinning its objective to raise its profile and client base in Ireland, Helvetia Wealth set up an office at Adelaide Chambers on Peter Street, Dublin, last October. "The Dublin office was established to help service our growing number of Irish investors," McLean said.

Headquartered in Zurich, Switzerland, Helvetia has a 100 per cent owned subsidiary in Liechtenstein, which is a member of the European Economic Area (EEA) and is authorised to operate in Ireland through the IFSRA.

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