

# Wealth Manager of the Year 2020 - Switzerland

When it comes to investing wealth, it pays to find someone who knows the needs of the individual. The team at IndexInvestor AG have proven time and again to be some of the leading lights of the finance industry. We take a more in-depth approach to their work as we celebrate their enviable success.

When a patient is treated by a doctor, they expect the doctor who choose a form of treatment that is supported by clinical studies in order to ensure the best chance of success. This evidence based approach is one which the IndexInvestor team firmly believe in and bring to the table for all of their clients.

The team have become the go-to advisor for renowned doctors and entrepreneurs who are over 50 years old, and for whom family is the most important factor. By only applying techniques that have strong evidence of success, clients have been able to embrace a better investment experience. At IndexInvestor, clients have the time to focus on what is important in life, as the team take the strain of handling matters of money.

When IndexInvestor began operations, it was with the desire for index returns through investments with index funds in 2000. This was not a service that banks provided, and with conflicts of interest between banks and investors, there was a clear need to build up a set of skills independent of these organisations to free up assets and manage the conflict of interest. IndexInvestor, a not-profit-profit wealth management company owned by selected clients, was set up in 2007 and has gone on to be the first wealth management company in Switzerland to manage assets exclusively on the basis of evidence.

Onboarding of new investors at IndexInvestor utilises a world class process made of three meetings. At the first meeting, the focus is on discovery. This means exploring where an investor wants to be, where they currently are and where are the gaps. The second meeting is about validating an initial investment plan that the team at IndexInvestor create. The third meeting, the commitment meeting, is where a joint decision is made by both parties on whether or not they should work together in the long term to provide clients, with the best possible chance of reaching what is most important to them.

Each investor is responsible with ensuring no conflicts of interests in their wealth management setups, and clients should be encouraged to ensure that no third parties are paying Wealth Managers to use specific products. At IndexInvestor, everything is transparent to ensure that no misgivings can be had on the part of the client.

An approach such as this has placed the company in excellent stead for the future, and for the various challenges that 2020 has placed on all companies. The COVID-19 pandemic has been handled well by the team, with investors showing good behaviour throughout. They have not only followed their plans, but most have agreed to make an additional rebalancing during the crisis. Some new clients have raised their hand having their wealth managed, making a great start in their financial careers as the stock market begins to recover.

Over the last few years, the team at IndexInvestor have gotten close to where they want to be. Committed to providing the best possible customer service, as well as to their boutique status, they want to serve no more than 60 optimal clients. This does not mean that their doors are shut, with selected clients for whom they can add substantial value more than welcome to enquire.

What IndexInvestor brings to the table is a clear plan built on solid ground. Strong roots ensure that great growth can come for the team at IndexInvestor, the investors and the clients. It's the true secret of their success.

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## INDEXINVESTOR

