



Bruellan

YOUR TRUSTED SWISS PARTNER
FOR WEALTH MANAGEMENT,
ADMINISTRATION AND TRANSMISSION

OUR MISSION

To provide comprehensive and innovative wealth management services, on a very personalised basis and avoiding conflicts of interest.

We strive, thanks to our teams' high level of expertise, to preserve, consolidate and enhance the assets of our clients, be they individuals, families or entrepreneurs with diversified and international wealth.

«Since Bruellan was established, we have deployed bespoke and independent wealth management services in a spirit of partnership, ethics and shared values with our clients.»

Antoine Spillmann - Founding Partner

OUR HISTORY

Founded in Geneva in 1991, Bruellan was then taken over in 2001 by Antoine Spillmann and Jean-Paul Tissières. It was one of the first independent asset managers to gain FINMA approval, back in 2008 already.

Convinced of the importance of providing fund management services to its clients, families and entrepreneurs, Bruellan launched its Asset Management department in 2015 in order to propose a range of thematic funds, both internal and external, reflecting the company's vision and bringing about innovative, original and relevant investment opportunities.

Over the years, Bruellan has continued to strengthen its teams, so as to offer cutting-edge services in terms of financial innovation, market knowledge and governance.

In this regard, Bruellan is one of the few asset management companies to boast a fully independent board of directors, more than one third of whom are women.

Going forward, we intend to further evolve our wealth management services, to meet the needs of new generations of investors and entrepreneurs.



SWITZERLAND

Switzerland is a globally recognised centre of excellence in wealth management and administration.

Our long banking tradition has led to the development of leading-edge know-how, strongly influenced by the precision and thoroughness that have made the reputation of our industrial sector.

In addition, Switzerland enjoys a high degree of political stability, boasts undisputed financial strength and is recognised for its independence.

Bruellan, while looking to the future, prides itself on anchoring its values in this Swiss culture.

ASSET MANAGEMENT

From its various offices, all located in Switzerland, Bruellan provides tailor-made global wealth management services.

Focus on the individual, our approach to wealth management is fully personalised. Together with our clients, we determine a bespoke risk profile and develop an investment strategy that is aligned with the jointly defined objectives

MULTI-FAMILY OFFICE

Our Multi-Family Office department handles the overall management and administration of your private affairs, based on a specific mandate.

Our family office services notably include:

- > Relocation
- > Company incorporation, accounting and administrative management
- > Legal and tax services
- > Advice on philanthropy and charitable projects
- > Any other service necessary for the proper administration of your non-financial assets and lifestyle.

Although generally separate, we can, upon request, centralise wealth management services and the Multi-Family Office.

THEMATIC FUND MANAGEMENT

Managed by a dedicated team of seasoned and highly qualified fund managers, our investment funds are focused on 3 main themes:

SWITZERLAND

Our natural market, that which we know best and has, over the decades, proven its strength, its performance and its resilience.

- > **Our Swiss equity fund, "Bruellan Dynamic Swiss Equities", reflects the composition of the Swiss economic fabric in its diversity, innovative power and ability to generate performance over the long run.**

FAMILY

A value dear to us and which, when applied to fund management, makes for undeniable performance over the long term.

- > **Our "Protea Swiss Family Enterprises" equity fund brings together these qualities by focusing on solid, innovative and sustainable companies whose founding families still own a significant part of the capital.**
- > **Our "Protea European Family Enterprises" fund extends this vision to European securities that meet the same criteria.**

QUALITY STOCKS

This notably pertains to a company's solid fundamentals and proven business model, enabling high cash flow generation throughout the economic cycle.

- > **Our "Bruellan Dynamic Tactical" fund, which was the first to be launched by Bruellan, comprises a selection of the world's top performing companies.**

PLEASE CONTACT US



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WEALTH MANAGEMENT

THEMATIC FUND MANAGEMENT

MULTI-FAMILY OFFICE



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