



BOCCARD & PARTENAIRES SA

GESTION DE PATRIMOINE – FAMILY OFFICE

OUR REASON TO BE

PRESERVE GROW TRANSMIT

BOCCARD & PARTENAIRES SA HAS BEEN THE BENCHMARK FOR PRIVATE WEALTH MANAGEMENT AND FAMILY OFFICE SERVICES IN FRIBOURG AND NEUCHÂTEL FOR OVER 70 YEARS.

OUR MISSION IS TO HELP YOU PRESERVE, GROW AND TRANSMIT YOUR ASSETS IN COMPLETE INDEPENDENCE, IN STRICT ACCORDANCE WITH YOUR PERSONAL VALUES. WE'RE PROUD TO HAVE A TEAM OF HIGHLY SKILLED SPECIALISTS WHO UNDERSTAND YOUR NEEDS, GIVE YOU TRANSPARENT ADVICE AND MANAGE YOUR ASSETS EFFICIENTLY.

OUR APPROACH



OUR VALUES

EVERYONE'S PLANS AND NEEDS ARE DIFFERENT. THAT'S WHY WE OFFER YOU A TAILOR-MADE, ECONOMICALLY RELEVANT AND TAX-EFFICIENT MANAGEMENT APPROACH, BASED ON AN OVERALL ASSESSMENT OF YOUR ASSETS AND YOUR INVESTMENT PROFILE.

IDENTIFYING YOUR NEEDS

At our first meeting, we'll analyse your personal and family situation, your assets, your current needs and your plans for the future. This meeting also provides an opportunity to take stock of any tax or inheritance issues and to clarify your expectations.

SUPPORTING YOU

Your needs are not the same at 25 or 65. Are you looking to build up your savings, invest your money, buy a property, secure your children's future, prepare for retirement or pass on your assets?

ADVISING YOU

Once we have identified your needs, objectives and expectations, we will work with you to define your investor profile. Do you want to protect your capital, or are you aiming for growth? Are you prepared to compromise? For how long? These are all essential considerations when it comes to choosing the right investment strategy.

Certain choices are crucial for the future. We are committed to establishing a special relationship with you so that we can be there at the right time to give support and advice.

Contact us for a no-obligation consultation.

BOCCARD & PARTENAIRES SA IS ABLE TO OFFER A MULTITUDE OF TALENT, ADVICE AND EXPERTISE, ALL UNDER ONE ROOF. REACTIVE AND DYNAMIC, OUR FIRM OFFERS YOU ATTRACTIVE, COMPETITIVE SOLUTIONS. BUT OUR GREATEST STRENGTH LIES IN THE VALUES THAT DRIVE US AND GUIDE OUR ACTIONS.

SKILLS AND KNOWLEDGE

Alongside their expert knowledge of private wealth management and family office, our specialist advisors can also offer you the benefit of their mastery of economic, tax and legal issues.

STABILITY

By choosing us, you are entrusting your assets to a company that is wholly Swiss-owned and that focuses on preserving your capital without sacrificing an appreciable return. You can count on our dedicated, loyal and approachable team.

INDEPENDENT

As we are not tied to any bank, we can offer you greater freedom for your investments. More than a customer, we see you as a partner. Our long-term client relationships are based on trust and quality service.

CARE AND DISCRETION

As leading experts in our fields, we look after your most precious assets - both human and material - and we do so with the utmost discretion.





BOCCARD & PARTENAIRES SA

OUR FIRM

HISTORY

Boccard & Partenaires SA brings several stories together under one roof, Active in private wealth management for several generations, Société Anonyme Boccard & Cie has a long history of expertise, having been founded in 1943 by the de Boccard family. In 1988, the firm joined forces with the Müller family, represented by Julien and Louis-Philippe, the two current managing partners. Athemis Gestion de Fortune SA was formed in 2012, following the transformation into a limited company of the wealth management division of Athemis, notaries, lawyers and tax specialists, whose origins date back to the firm Etude Clerc, founded in 1804. Athemis brings extensive knowledge of private wealth management and family office solutions. Boccard & Partenaires SA is accredited by FINMA and is subject to the strict supervision of AOOS. Boccard & Partenaires SA is headquartered in Neuchâtel.

BOARD OF DIRECTORS

The Board of Directors is made up of three members: Antoine Jaques (Chairman), Julien Müller and Pascal Moesch

MANAGEMENT TEAM

The company is co-managed by (in alphabetical order) Cédric Abplanalp, Julien Müller and Louis-Philippe Müller.

YOUR PARTNERS

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