

International Financial Planning

Our Edge

- Regulated in Switzerland, EU and USA
- Proven Experience
- Quality
- Professional & Ethical Standards
- Highest Security
- Bespoke Service



CBM INVESTMENT MANAGEMENT

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Overseen by FINMA (Swiss Financial Market Supervisory Authority)

Focus Areas

- Comprehensive financial review
- Meeting university fees
- Tax mitigation
- Retirement savings growth
- Portfolio review
- Building for property deposit
- Depositor protection
- Pension control
- Cross-boarder saving plans
- Estate & inheritance tax planning
- Wealth management

Swiss 2nd & 3rd Pillar Pensions QROPS Trusts 401k / IRA / ROTH
Protected International Saving Account Bespoke Discretionary Mandates