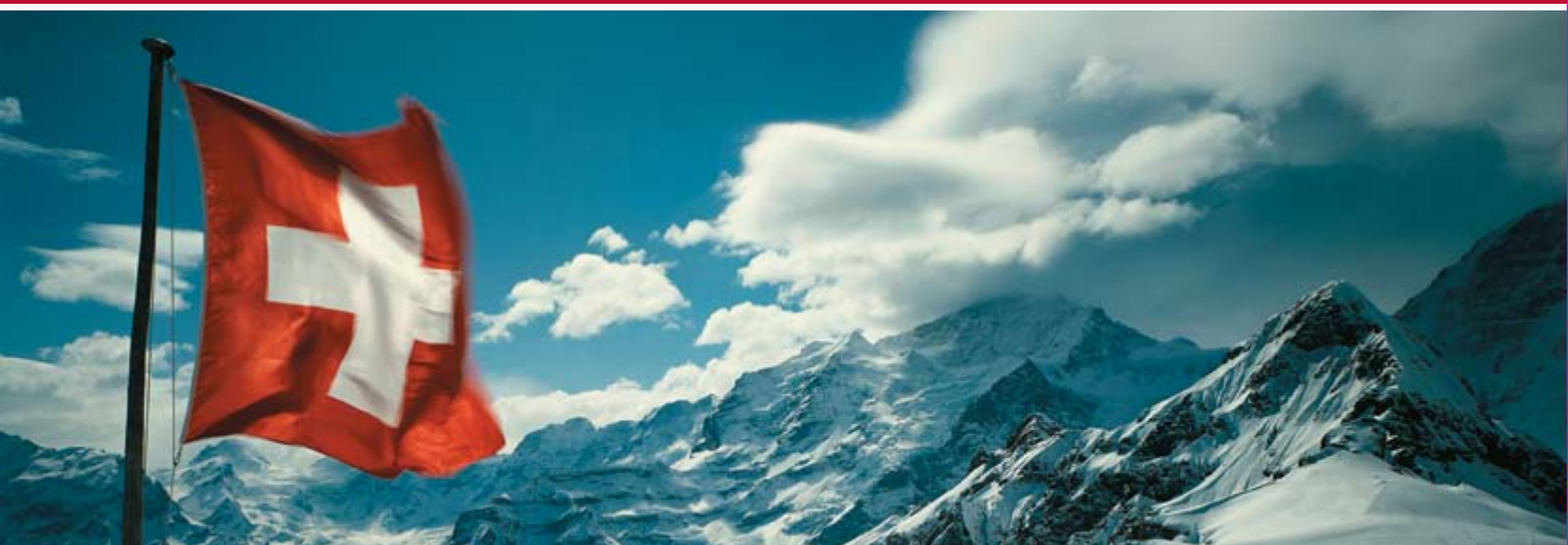


*The SwissGuard Solution™*



**SWISSGUARD**  
i n t e r n a t i o n a l

A man in a dark suit, white shirt, and patterned tie stands with his arms crossed. He is looking directly at the camera with a neutral expression. The background is a blurred, high-angle view of a crowd of people, all rendered in a monochromatic red color. The overall composition is professional and focused on the man's presence.

Privacy and Protection for Your Money™

*The SwissGuard Solution™*

## Who we are.

SwissGuard International, GmbH,  
is an independent financial consulting firm  
established to meet the private investment and  
financial protection needs of international clients.

We are market leaders in the selection and  
establishment of international investment and  
retirement programs that deliver legal tax  
advantages, privacy in your money affairs,  
and maximum protection of assets.

We call this the SwissGuard Solution™ .

Anyone with capital  
they want to protect  
and preserve.

Investors who want to  
diversify their  
investments globally.

Successful entrepreneurs  
with large bank loans and  
sensitive creditors.

Investors who believe that the  
U.S. Dollar will depreciate.

Investors who are  
concerned about the  
present turbulent and  
volatile markets.

Mature seniors  
concerned about loss of  
purchasing power of their  
retirement income.

Investors who are  
concerned about privacy  
and are seeking a safe  
haven for their wealth.

Anyone who is looking  
for a simple, cost-free  
way to invest offshore.

Wealthy individuals who  
may be a target for  
frivolous lawsuits.

## Who are our clients?

Any professional who  
could be subject to liability  
or malpractice lawsuits.

Investors who are  
unhappy with the returns  
on their annuities, CDs,  
term deposits, Savings  
Bonds, etc., after  
taxes and inflation.







## Products and Services

We offer our services exclusively to international clients who look to us for high ethical standards, security, long-term financial performance, and innovation. We confine our core activities to **insurance planning, investment manager selection, and trust planning services.**



[swiss-annuity.com](http://swiss-annuity.com)



*The SwissGuard Solution™*



## Insurance Planning

As Swiss insurance specialists, we constantly monitor market conditions, pricing, and availability to bring you the finest selection of international life insurance and annuity products.

### **Swiss Life Insurance**

Switzerland is known as the life insurance capital of the world, and it offers the finest policies available, backed by the strongest insurance companies in the world.

### **Swiss Annuities**

After extensively researching every major type of investment asset in the world, we have come to the conclusion that the Swiss Annuity is one of the safest and most powerful tools for asset growth and financial protection available today. Swiss annuities offer a rare combination of low risk with a high potential for profit.

As your designated Swiss representative, we are compensated directly by the insurance companies we represent. This means that the contributions you make and the benefits received are exactly the same regardless of whether you are dealing directly with the insurance company or taking advantage of our services. You save time and money because you benefit from our experience and expertise, as well as our comprehensive support services designed exclusively for international clients.

We are always independent which affords us the opportunity to represent our clients best interests and allows you to enjoy the accurate information and advice you need to make intelligent decisions.



## Investment Manager Selection

To enable you to create a personalized investment strategy, our investment managers offer three different portfolio models for structuring your private investment account. All of the strategies can, of course, be combined according to what best suits your needs and goals.

### Special Asset Classes

These have clearly defined investment goals. They can be combined to form a portfolio or used separately as additions to an existing portfolio for additional diversification.

#### Your Benefits

- Privacy
- Flexible investment strategy
- Hedge against decline of home currency
- Global diversification
- Liquidity
- First class custodians
- First class customer service

### Strategy Classes

These are primarily structured according to your tolerance for risk and market volatility. Based on modern portfolio research and theories, expected performance and risk models of a portfolio can be calculated. Our special client analysis tools will guide you to the category and custodian best suited to your financial goals and risk profile.

#### Your Benefits

- Asset protection
- Privacy
- Flexible investment strategy
- Hedge against decline of home currency
- US-tax deferral
- Global diversification
- Liquidity
- First class custodians
- First class customer service

### STAR Investment Portfolio

A STAR portfolio strategy combines a bank account, a brokerage account and an insurance policy under one asset-protected umbrella. This all in one account provides maximum flexibility for investors.

#### Your Benefits

- Asset protection
- Flexible investment strategy
- Hedge against decline of home currency
- 100% Capital guarantee
- Liquidity
- First class custodians
- First class customer service

We understand the concerns of international investors like you. Whether you need global diversification for lower risk and higher returns, tax advantages, maximum asset protection or even ready access to your funds, we can design a portfolio that's just right for you. And because we are independent, we can help you choose the right investment manager with no conflicts of interest.



## Trust Planning

Our successful high income, high net worth clients have different needs than everyone else. You have much more to lose—to a variety of risks such as taxes, lawsuits, or faulty planning. You have a present and continuous need for sophisticated compliant strategies—strategies which incorporate and integrate tax savings, asset protection, estate, and business planning so as to save and make money.

There are many meaningful objectives behind accruing wealth: professional pride, taking care of one's family, goals for education, and successful retirement and future self-reliance, to name a few. We can help make such objectives attainable through the following means:

- Technical analysis of available tax, asset protection, estate, business, and investment technique options.
- Specializing in integrating transparent IRS compliant domestic and offshore tax planning techniques.
- Implementation of strategies and techniques.
- Retention of qualified persons, firms, and institutions—domestic and international experts in legal, accounting, private banking, investment—with the specialized knowledge to furnish services on your behalf.

### **Swiss Private Banking**

More than 40% of the world's private wealth held offshore is managed by Swiss financial intermediaries. Meeting international money requirements has long been a proud Swiss tradition.

The banks we recommend to our clients as custodians have no investment banking relationships that can create such conflicts of interests as we have seen with U.S. based brokers. The same can be said about the insurance companies we recommend.

Switzerland is, clearly, an ideal choice for the investor who wishes to diversify by investing abroad. It has a strong financial base, laws designed to protect investors, and the expertise to allow investors access to various markets and opportunities not available domestically.

That's why investors throughout the world have said for more than 200 years that...

Switzerland  
Means Safety



## Client Services

Your personal Private Client Advisor is thoroughly knowledgeable in the tax and legal questions you may have about investing offshore and our highly qualified staff members have extensive experience serving international clients. All personnel speak fluent English and will accommodate your requests or answer your questions in a timely fashion.

Our style of client relationship is, we feel, unparalleled. Our individualized personal service ensures that we are there when you need us, providing continual monitoring and support and we can deal on your behalf with banks, insurance companies and other legal and tax advisors.

Bank On Us  
For Global Investment Opportunities  
Combined With World Class Service!

We understand the concerns of the international investor. By implementing a safe and sound global investing strategy through the resources available to you at SwissGuard International, you are free to travel the world, enjoy life, and concentrate on growing your business or spending time with your family.





**SWISSGUARD**

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