



Geneva WM teams up with platform to offer pension plans

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by **CAMILLA GIANNONI**

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Geneva-based Forum Finance Group has teamed up with independent platform Liberty to offer pension plans.

The solutions are aimed at entrepreneurs and executives and include tailor-made portfolios for vested benefits assets of more than CHF 750,000 and diversification among several asset classes.

Forum Finance Group's managing partner Hippolyte de Weck, who oversees the pension solutions business, said: 'A perfect knowledge of the technical intricacies of insurance, taxation and pension planning is naturally essential.

'However, in the end, it is the comprehensive view of the client's wealth situation and the personalisation of the investment management that will make the difference between a well-deserved

retirement and a dreaded one. That's why a pension solution must not only be tax-efficient, but also tailored to one's needs.'

Founded in 2005, Liberty offers services in the field of occupational benefits and tied pension assets. At the end of 2018 the pensions assets entrusted to Liberty totalled over CHF 2bn.