AskFin Consulting

Design your financial future with our holistic financial planning. We provide clarity on assets, income, and expenses to offer you long-term security. From buying property to retirement – we deliver multi-layered solutions for all life stages. Trust our expertise to achieve financial success in the future.

What do we offer?

Financial Check Up

Comprehensive financial planning is the key to success. Here, you don't deal with the random ups and downs of financial markets, but with the indicators that you can influence yourself.

With the Financial Check Up

- you will know the amount and composition of your entire wealth.
- you will know which savings you add to your assets year after year.
- you will be able to see how your total wealth will develop over the next few years and whether you will achieve your financial goals and wishes.
- you will recognize whether your financial assets are invested in line with the guidelines you have defined.
- you will become aware of the top issues that you should address first and the ones that should be on your radar.

☐ **Yes, I would like to do a Financial Check Up** (Cost CHF 500 plus VAT).

Sample Financial Check Up without topic consultation

Subsequent Topic Consultations

We illustrate for each topic how the scenarios you have chosen affect your income, expenses, and long-term wealth development.

Based on this foundation, we propose suitable actions so that you can achieve your goals and wishes.

Real Estate

- ☐ Buy a property
- ☐ Sell your property
- ☐ Maintain your property
- ☐ Review your financing

Taxes

- ☐ Know your most important tax indicators
- ☐ Use tax-saving opportunities

Dreams and Life Events

- ☐ Retirement (ordinary, early, or late retirement)
- ☐ Career changes (career moves, changes in level of employment, sabbatical, etc.)
- ☐ Family changes (marriage, children, etc.)
- ☐ Major purchases - you want to fulfill a long-held wish

Lebensrisiken

- ☐ Death
- ☐ Disability
- ☐ Divorce
- ☐ Nursing Care
- ☐ Unemployment

☐ **Yes, I would like to get an offer for the selected topic consultations** (Additional costs vary depending on the number and complexity of the desired topic consultations. Cost ceiling per scenario: CHF 750 plus VAT).

Sample Financial Check Up with topic consultation «Retirement»

* If you or your partner reach the ordinary retirement age within the financial planning time horizon of 15 years, we will show the development of your assets only up to this point. If you would like a detailed retirement planning, we will be happy to provide you with a specific topic consultation.

AskFin Consulting

How closely would you like us to accompany you?

We handle the collection of data required for the preparation on your behalf

[Data collection sheet]

The following documents are typically required: last tax statement, current pension fund statements, pension fund regulations, information about existing insurance policies, vested benefits accounts/policies, and pillar 3a accounts/policies, etc.

☐ Yes, I would like assistance with data collection (Cost CHF 400 plus VAT)

You desire a detailed final discussion to review the insights gained.

☐ Yes, I would like a detailed virtual final discussion (Cost CHF 200 plus VAT)

☐ Yes, I would like a detailed physical final discussion (Cost CHF 350 plus VAT)

For specialized topics within the above areas, we are happy to connect you with adequate experts (inheritance advisors, tax consultants, lawyers) from our network.

Of course, if desired, we will accompany you in the implementation process.

Who are we?

AskFin Consulting, founded in 2001, is an external asset manager for private and institutional clients accredited by the Swiss Financial Market Supervisory Authority (FINMA).

We are committed partners dedicated to helping you achieve your goals. We highly value independence and confidentiality. The occasionally arrogant attitude in the financial world is not our style.

YOUR PERSONAL CONTACT FOR FINANCIAL PLANNING

Christian Rutz studied Business Administration and Economics at the University of Bern, completed an MBA at the IESE Business School in Barcelona, and is a Chartered Financial Analyst (CFA), Chartered Alternative Investment Analyst (CAIA), and certified financial planner.

He began his career in management consulting at PwC. With over 20 years of experience in private banking and wealth management, he has worked in various roles, including as a financial planner for Swiss clients in the private banking division of a major Swiss bank. He was responsible for the development of the advisory process and the implementation of a comprehensive financial planning tool for investment advisors.

He is the founder of the website myprivatebanker.io and the author of «My Private Banker» - a guide for independent wealth management for individual investors.

Do you want to be advised by us?

I hereby mandate AskFin Consulting to develop the financial planning elements indicated above. For the selected topic consultations, I would like to get a specific offer.

Name: ____ First Name: ______________________________

Street and House number: ____

Postal Code:____City: ____________________________________

Email address: ____

Phone: ____

Date, Location:_______________________________________ Signature: _______________________________

Invoicing will be handled by AskFin Consulting AG

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