



## INTERNATIONAL DIVERSIFICATION FOR CANADIAN INVESTORS

We offer holistic, tax-compliant solutions to Canadian investors, to help them easily diversify their assets internationally.



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## WHO WE ARE

Dynamic Tree Asset Management AG. is an independent investment management firm based in Switzerland, which caters to the needs of Canadian high-net-worth and ultra-high-net worth individuals and families. Our goal is to simplify the investment management process for Canadian investors who wish to manage assets across jurisdictions and to benefit from the many advantages international diversification entails.

Focused on advising Canadian clients, we continuously develop our specialist knowledge in order to better understand your needs. Our registration with the provincial securities regulators of Ontario, Québec, Alberta and British Columbia as a 'Portfolio Manager' allows you to benefit from the expertise of an international firm in combination with the peace of mind offered by a Canadian regulator.

## PHILOSOPHY

The philosophy that guides our business is built on a clearly defined and consistently applied investment management process, combined with the concept of global diversification. These principals are what drive us to seek competitive returns for our clients.

## EXPERIENCE

At Dynamic Tree, we have brought together a team of financial professionals with complementary skills and experience. Our advisors have many years of experience advising Canadian high net-worth and ultra-high-net-worth individuals and families.





## WHY INVEST ABROAD

As a Canadian investor, there are many compelling reasons to diversify your wealth internationally. An international portfolio provides for interesting investment opportunities, many of which may not be easily available in Canada. Also, investing internationally can help safeguard against the risk of unforeseen developments that could negatively affect the Canadian dollar or the Canadian economy as a whole.

Switzerland has a longstanding reputation for excellence in financial services, particularly in investment management. Furthermore, Switzerland's economic and political continuity are a hallmark of security and stability. Switzerland's stability, coupled with its solid currency and proximity to global markets, make it an ideal place to diversify your wealth. The benefits of diversifying your investments abroad include:

- Geographic asset diversification
- Multi-currency capabilities
- Longstanding and secure jurisdiction with a stable currency
- Access to a larger pool of foreign investment opportunities
- Protection against negative developments in the Canadian economy or to the Canadian dollar

## SWITZERLAND: STABILITY, HISTORY AND QUALITY





## OUR OFFERING

We provide both discretionary and advisory investment management services based on your desired level of involvement in the day-to-day decisions affecting your portfolio. Our international portfolios are designed to offer you diversified exposure to global financial markets in accordance with your individual risk profile.

To enhance our asset management services, we also offer consolidated reporting – an invaluable service if your portfolio involves multiple banks or jurisdictions. Consolidation provides you with a bird’s eye view of your portfolio, facilitating investment decisions and risk management.

### DISCRETIONARY

With a discretionary mandate, you delegate responsibility for the management of your portfolio to a team of dedicated experts without the worry and workload of investment decision-making and administration. You work with your personal advisor to develop a customized investment strategy, and we keep you well informed about the status of your portfolio.

### ADVISORY MANDATES

By choosing our advisory mandate, you become part of our investment management team. You have the final say in all decisions relating to your investments, and we work closely with you to tailor the selected strategy to your goals and needs. No transactions are carried out without your prior approval.





## TAX REPORTING MADE EASY

We view tax compliance as an essential part of wealth protection. To simplify the process of filing your taxes in Canada, we provide all the information you need, such as a capital gains/losses statement, a statement of income earned, etc. In addition, we provide you with the necessary data to complete form T1135 (Foreign Income Verification Statement). Form T1135 needs to be completed and filed with the CRA annually if the total cost of all foreign property held at any time during the year exceeds C\$ 100,000. If you wish, we can liaise directly with your accountant to answer all of the questions he or she may have regarding your account with us.





### “THE ONLY CONSTANT IS CHANGE”

The name of our company says it all. The word tree represents Switzerland’s long, stable history as a nation and custodian of wealth. In addition to continuity, however, trees also symbolize the ability to adapt to an ever changing environment just as nature adapts to the seasons.

As global conditions frequently demonstrate, adaptability is every bit as important as stability. Accordingly, our response to developments that impact our investment strategies is dynamic.

When the only constant is change, our ability to adapt is the greatest asset we have. Although arriving at ideal solutions can be challenging, it does not have to be.

With Dynamic Tree, you are already there.

## CONTACT US

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