Attività di gestione patrimoniale con licenza



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BUSINESS TYPE
Gestione delle attività

COUNTRY
Belize

BUSINESS ID
L#20240718

Questa Belize Asset Management è un'azienda di servizi finanziari specializzata in consulenza sugli investimenti e soluzioni di gestione patrimoniale su misura per clienti individuali e istituzionali. Sfruttando i vantaggi strategici del Belize come centro finanziario offshore, l'azienda offre strategie di investimento su misura, gestione del portafoglio e servizi di conservazione del patrimonio. Con un'attenzione particolare alla trasparenza, alla conformità e alla gestione del rischio, questo Asset Management si propone di aiutare i clienti a massimizzare i loro rendimenti salvaguardando il loro patrimonio in un ambiente riservato e sicuro. Il team di esperti dello studio si dedica a comprendere le esigenze dei clienti, a garantire un servizio personalizzato e a promuovere una crescita finanziaria a lungo termine attraverso opportunità di investimento diversificate.

L'azienda si concentra sulla gestione degli asset e sulla consulenza ai clienti privati.

Licenza commerciale

Per "protezione e gestione internazionale del patrimonio" si intendefornire consulenza per la protezione del patrimonio e la pianificazione successoria,compresa, a titolo esemplificativo ma non esaustivo, la strategia di investimento e la gestione del portafogliogestione del portafoglio, gestione di immobili e consulenza fiscale,la detenzione di fondi per conto di clienti che conducono affari,comprese le transazioni immobiliari, nonché detenere fondi eeffettuare esborsi per il completamento di progetti che ilcliente sta lavorando.

Assistenza

- Attività di gestore patrimoniale o consulente indipendente.
- Mandati di gestione discrezionale o di consulenza AAM con depositari locali e internazionali.
- Accordi personalizzati tra introduttori commerciali, consulenti e AAM.
- Apertura e gestione di conti di investimento e depositi.
- Conservazione dei documenti in Belize.

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