

Attività di gestione patrimoniale con licenza



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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 intende fornire 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 portafoglio, gestione 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 e effettuare esborsi per il completamento di progetti che il cliente 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.

BUSINESS TYPE

Gestione delle attività

COUNTRY

Belize

BUSINESS ID

L#20240718

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