ZWEI WEALTH

2026-10

Price list

My Wealth Office

- Integrated, year-round care of your assets by a personal advisor
- plan. / find. / control.

Assets under advice (million CHF)	1	5	10	20	50	100	500
Annual fee	0.65%	0.40%	0.35%	0.25%	0.21%	0.15%	0.06%

Success base fee model	Request a quote		
Minimum fee	CHF 3'500	**Minimum duration**	12 months

Pay per Use

These service elements can be purchased individually / modularly or on an hourly rate.

Consulting Services / A Wealth Officer handles everything wealth related for you.

Asset size (million CHF)		1	5	10	20	50	100	500
plan.		0.40%	0.20%	0.15%	0.10%	0.08%	0.05%	0.03%
find.	CHF/portfolio	0.50%	0.30%	0.20%	0.15%	0.10%	0.06%	0.05%
Portfolio analysis	CHF/portfolio	1'600	3'500	5'000	7'600	10'000	12'000	25'000
Project work		hourly rate CHF 400 / day rate CHF 3'000 / + expenses at cost						
Minimum fee (plan., find. or control.)		CHF 3'500						

Important: ZWEI Wealth does not receive any retrocessions from asset managers, banks or other financial service providers.

All information are non-binding price recommendations without VAT. Please refer to a ZWEI expert for a offer specific to your case.