



Wealth Management

Preserving your wealth, ensuring your legacy

At Tolomeo Bank Limited, we provide a comprehensive suite of Wealth Management services designed to protect, manage and grow your wealth over time.

Our approach combines discipline, experience and a long-term perspective, ensuring that each portfolio is aligned with individual objectives and risk parameters.



Our Wealth Management offering

At Tolomeo, we provide discretionary, advisory and execution-only investment services.

Each approach is designed to ensure all portfolios are carefully structured to reflect your financial objectives, risk appetite, time horizon, as well as any specific restrictions or requirements. Your wishes are at the heart of each management strategy.

Discretionary services

Under a discretionary mandate, the portfolio management activity is delegated to our experienced team or to an External Asset Manager of your choice. In both scenarios, the activity will be performed according to agreed parameters.

Our asset management team can leverage the expertise of investment professionals who have been active in the financial services industry for more than forty years.

Alternatively, if you choose to appoint your own external managers, our relationship and support teams will work alongside them throughout the entire life of your banking relationship with our institution. Furthermore, they will ensure that the investment strategies are implemented consistently and efficiently.

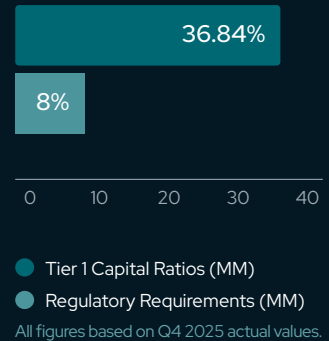
Through these services, you will benefit from:

- The expertise of a dedicated portfolio management team, whether internal or external
- Active and disciplined portfolio oversight
- Continuity and consistency in portfolio management

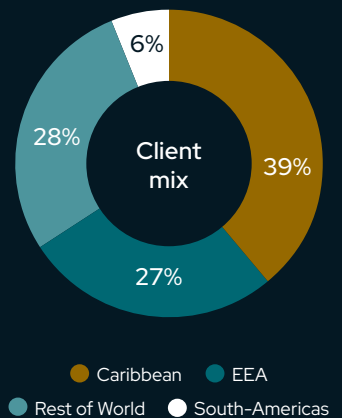


Strong capital ratios

Total Capital / Risk Weighted Assets



Individual & Corporate clients across multiple geographies





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Advisory services

Under an advisory mandate, you remain actively involved in the management of your portfolio and retain final decision-making authority.

Our dedicated advisors provide considered investment recommendations aligned with your financial objectives.

Through these services, you will benefit from:

- Direct involvement in investment decisions
- Access to professional investment advice
- The possibility to evaluate each investment opportunity to ensure it aligns with your financial objectives



A structured & disciplined approach

We apply a multidisciplinary approach across Wealth Management, banking and asset management services.

You will benefit from:

- In-house expertise across multiple disciplines
- A structured and risk-aware investment framework
- Careful portfolio construction and ongoing monitoring

A personalised relationship

Whether you are an entrepreneur, shareholder, self-employed or independently wealthy, Tolomeo Bank Limited will tailor a solution aligned with your requirements.

Our dedicated Relationship Managers provide a highly personalised service focused on long-term partnership and continuity.

Execution-only services

Under an execution-only approach, you will retain full control over your investment strategy. We will just execute your instructions in an efficient and cost-effective way, using our broad and well-diversified broker network.

Investment opportunities may be presented, with execution taking place only upon your instruction.

Through these services, you will:

- Retain full control over investment decisions
- Leverage our network of financial intermediaries
- Preserve full independence in managing investments



Begin the conversation

Contact us to arrange a consultation with one of our Wealth Management specialists.

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