



Referring Partner Program

A partnership built on trust, discretion, and shared success

At Tolomeo Bank International, we work with a select network of professional partners, advisors, and introducers to provide clients with a secure and sophisticated Private Banking solution.

Our approach is simple – we enhance your client offering, protect your relationships, and build long-term partnerships based on trust and alignment.

Why partner with Tolomeo?

- The confidence of a US-regulated institution
- A discreet, client-centric service model
- Strong governance and conservative risk culture
- A long-term approach to wealth preservation and growth

We act as an extension of your service.



Benefits for your business

- **Attractive referral remuneration**
A transparent and competitive structure aligned with long-term relationships
- **Enhance your client offering**
Provide access to world-class international Private Banking services without additional infrastructure
- **Strengthen client retention**
Offer a broader, more sophisticated financial solution
- **Dedicated partnership support**
A responsive, multilingual team working alongside you
- **Discreet and respectful approach**
Your client relationships remain central – always

Benefits for your clients

Your clients gain access to a fully integrated private banking platform:

- Multi-currency accounts (USD, EUR, GBP, CHF)
- International payments and foreign exchange
- Custody and safekeeping of assets
- Overdraft facilities and flexible Lombard lending solutions
- Pre-paid cards, standing orders, and attractive fixed-term deposits

All delivered with discretion, clarity, and long-term focus.

Strong capital ratios

Total Capital / Risk Weighted Assets

24.41%

8.5%

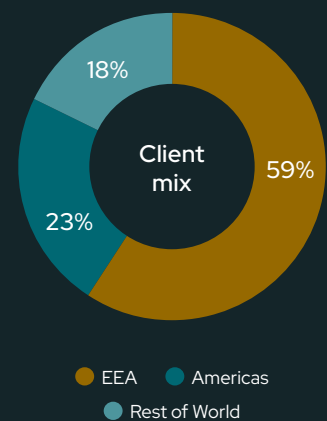
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● Tier 1 Capital Ratios (MM)

● Regulatory Requirements (MM)

All figures based on Q4 2025 actual values.

Individual & Corporate clients across multiple geographies





We value enduring partnerships built on integrity, trust, and shared success.

How the partnership works

- You introduce clients to your dedicated Account Manager
- We onboard and support them with a tailored Private Banking solution
- You remain a trusted point of contact within the relationship
- We provide ongoing support, reporting, and transparency

Our role is to strengthen your offering – not compete with it.



Who we work with

We partner with:

- Financial advisors and Wealth Managers
- External Asset Managers and family offices
- Legal and tax advisors
- Corporate service providers
- Professional introducers

All partnerships are built on shared standards, integrity, and long-term collaboration.

A relationship of mutual trust

At Tolomeo, we recognize the importance of the relationship between you and your client.

Our commitment is to:

- Protect that relationship
- Deliver exceptional service
- Provide stability, discretion, and continuity



Begin the conversation

We welcome the opportunity to explore how we can work together.

Contact us to discuss our referring partner programme and how we can support your clients with a trusted Private Banking solution.

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