

We invest your wealth.
Independent.
Personal.
Global.



Bellecapital. An independent, performance focused, wealth and asset manager.

Defining and achieving your financial goals

—
Performance focused and cost conscious

—
Independent and employee owned

Founder & CEO



“ Bellecapital was born of a simple vision, to deliver world-class, independent wealth management to private clients. As one of three founding partners and Chief Executive, I'm immensely proud of our team and all that we continue to achieve together. I remain as passionate now as I did back in 2009 when the business was launched. Back then, as now, our clients lie at the very heart of all our thinking.”

A handwritten signature in dark ink, appearing to read 'Beat Bass'.

Beat Bass
Founder & CEO

Bellecapital UK

Bellecapital UK is a wealth management company authorised and regulated in the UK by the Financial Conduct Authority (FCA), offering discretionary and advisory investment management services.

Bellecapital UK is part of the Bellecapital Group which operates internationally. Key locations are London and Zurich

Our personal relationship with our clients is characterised by professionalism and continuity. With a focus on direct investments, we offer transparency and security

Bellecapital is owned by its employees and was founded in 2009. The Company name refers to the main office location on Bellevue in Zurich

UK Team

The UK team is based in Mayfair and is responsible for providing wealth management advice to UK based clients.

The team has significant experience in providing wealth management advice to individual clients, families and their professional advisors

We believe that trust is the basis for success. When working together with you, we focus on a long-term and personal partnership

Our professionals have an average of over ten years experience serving clients in major financial institutions

We invest alongside you

We take responsibility for developing and maintaining your strategic objectives

2009

Bellecapital Swiss & European clients

Bellecapital AG established in Zurich under Swiss law for private clients

The three founding partners Beat Bass, Werner Diehl and Mark Eberle form the company Bellecapital. The company name refers to our main office location on Bellevue in Zurich

2011

Bellecapital International US Clients

Build-up of the SEC regulated Bellecapital International AG for US clients

Establishment of the SEC-registered entity Bellecapital International to service US clients

2015

Bellecapital UK

UK connected Clients

Integration of Bellecapital UK, formerly Williams de Broë Private, based in London. Further expansion of the UK client base

Rebranded as Bellecapital UK to broaden UK & Crown Dependent Territories client coverage

2016

Bellecapital Partners

Institutional Clients

Acquisition of the fund management company Bellecapital Partners, formerly GL Funds. The FINMA – regulated unit has been managing funds since 1995, focusing on the Asian market

2019

Bellecapital UK Ltd

Significant and continued investment in building out our UK business

10th anniversary and rebranding of Bellecapital

Broadened the choice of Global Custodians providing greater choice and security in holding assets

2020

Bellecapital UK Ltd

Appointment of UK Managing Partner to spearhead further UK investment

Launch of Bellecapital UK Private Office capability to service Family Offices and Professional Clients

Bespoke investment capability developed alongside the existing model portfolio services

Continued and clear focus on delivering performance and cost – effective investment management

Working In Partnership

“Our personal client relationships are characterised by professionalism and continuity. We are independent, personal and global. Our interests are entirely aligned with our clients.”

We place you at the centre of our thinking and are your long-term partner

We treasure our independence from banks which enables us to represent you to best effect

You

Direct interaction with us on all investment related matters

Bellecapital

As your investment adviser we have a limited power of attorney over your account with the custodian bank

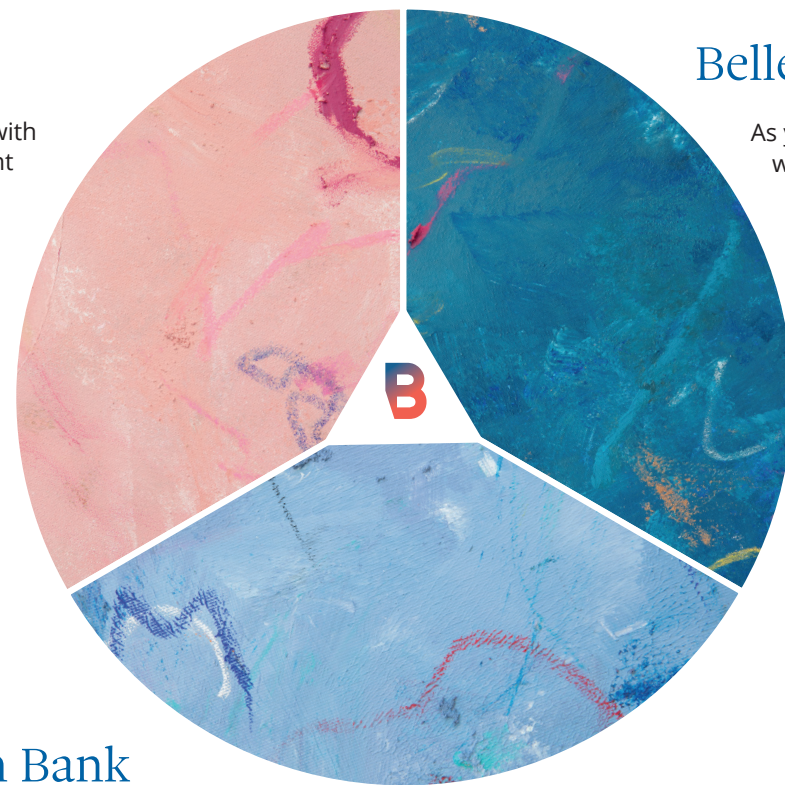
We only instruct the custodian bank to trade investments inline with your investment objective

Custodian Bank

This is where your account is held

Your selected custodian bank receives all investment and trade related instructions from Bellecapital

Responsible for ongoing portfolio and tax reporting along with online portfolio access



We place “You” at the centre of everything we do



We provide the highest level of safety and security for your assets



We are transparent, with a clear focus on cost effective delivery

You

We place you at the centre of our thinking. We take time to understand your requirements and deliver advice

We’re here for all your family with no dilution of service irrespective of individual account size

We are responsible for the day to day management of your investment portfolio

We continually review performance and your investment objectives

Regulated & Qualified

All relationship managers and advisors are fully regulated, highly qualified and undergo continual professional development

Working Together

We construct and actively manage investment portfolios while coordinating all other aspects of your wealth management

Your relationship will be managed by a dedicated and highly qualified investment advisor

You will benefit from independent and market leading portfolio construction

We work with your existing bank to ensure the seamless delivery of day to day banking requirements

Our independent approach and ability to select third party providers of custodial services ensures you benefit from market leading reporting, online access and real time information on the move

Independence & Professional Partnerships

We are totally independent and select third party specialists to ensure you receive market leading service and advice

We receive no remuneration from any third party professionals

Responsible Investing

Bellecapital are able to provide bespoke strategies to account for any client’s personal Environmental, Social and Governance concerns and can ensure these priorities are respected within the ongoing investment solution

Investment Management

We are an independent, wealth manager with investment and asset management at the very core of its proposition.

Your Investment Portfolio

We invest the time to understand your personal and financial objectives and construct the most appropriate portfolio that will deliver for you in the long run. We provide active management and constantly review your investment portfolio

In consultation we build a tailored investment portfolio to match your needs

We are independent of any external shareholder influence

We focus on cost effective investment performance

Your Investment Committee

With Bellecapital you have a dedicated and independent investment committee with many years of experience in managing private client investment portfolios

Our Chief Investment Officer (CIO) drives global asset allocation and strategic stock selection

Macro economic expertise is delivered by our dedicated Global Economist

Equity specialists provide coverage in all key geographies including US, Europe and Asia

We access independent investment research which helps inform and guide our investment decisions

Investment Offerings

We offer a full range of discretionary portfolios alongside advisory, private market and execution only services

For clients who require a higher level of market interaction we offer a trading advisory service

Principles of Discretionary Portfolio Management

We think and invest independently and act with conviction

We ensure suitable diversification to mitigate risk

Where possible, we invest directly to reduce costs and minimise complexity

Investment portfolios are constructed based on our proven investment process and your individual requirements

We demand portfolio returns for taking investment risk

Holding Your Assets

Our extensive and deep custodian bank relationships allow us to offer the highest level of comfort in the holding of your assets



Private Office Expertise

For Family Offices and Clients with significant complexity.

Our Private Office capability ensures access to Bellecapital's investment and trading specialists while providing seamless coordination with all other third party professionals

Investment & Asset Management

Bespoke, market leading investment and asset management solutions including access to private markets

Debt Advisory

Your independent partner to support debt structuring, origination and balance sheet management

Trading and Deal Execution

Direct coverage for trade generation, fixed income, equity, FX, alternatives, futures & options trading

Wealth Structuring

Support in the provision of seamless advice provided by industry leading experts in this specialist field

Wealth Planning

We help you clarify your strategic objectives and what is actually most important to you.

Wealth Planning

We work with you and selected wealth planning specialists to ensure the effective use of tax efficient structures & tax allowances

Pensions, ISAs, offshore bond structures, Family Investment Companies (FICs) & company structures

The use of borrowing (where appropriate) to create liquidity or to reinvest within your investment portfolio

The transfer of wealth from generation to generation

Wealth Structuring

We have extensive experience in helping clients structure their affairs including international considerations

While we do not offer tax and legal advice we have a deep understanding of the key issues and work closely with industry leading experts in this specialist field

UK Managing Partner



“ As a leading independent wealth manager, Bellecapital is committed to deliver world-class wealth management. We represent our clients with professionalism and continuity and are passionate about the quality of service we provide. As employees, we are also business owners. We invest alongside you which encapsulates the principles of partnership that continually guide the way we think and act.”

Corin George
UK Managing Partner

“

In leading Bellecapital UK, I could not be more proud of our business and our team. If our values and objectives resonate with you, please get in touch, we'd love to speak with you.”

—
Corin George

Contact

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Cutting Through Complexity

Important Information

Bellecapital UK Limited Registered in England No. 02123174
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Registration No. 140948

This brochure is for information purposes only, it does not constitute financial advice and is not a solicitation or an offer to buy or sell any security

The value of investments and the income from them can go down as well as up and you may not recover what you originally invest



Bellecapital

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