



# ACCLAIM

RECOGNISING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY  
THROUGH THE **WEALTHBRIEFING** AWARDS PROGRAMME



## EXCLUSIVE

WEALTHBRIEFING

SWISS EXTERNAL ASSET  
MANAGER (EAM) AWARDS  
FOR EXCELLENCE 2021

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# INDEPENDENCE, CONSTANT QUEST FOR SUCCESS WORKS FOR TELOMERE

**Tom Burroughes**, Group Editor of *WealthBriefing*, talks to **Dominique De Riaz**, Chief Executive of Telomere, about what makes this firm an award-winner.

**T**elomere Capital SA is a wealth management and financial consultancy firm based in Geneva. We offer wealth management and family office services to Swiss and international clients. We create investment portfolios in Swiss francs, euros and US dollars, spread over four risk profiles. All our investment solutions provide a durable approach. Our family office creation and supervision services offer families, foundations and private individuals a global approach, advising them on matters of governance, non-liquid assets, estate management and inheritance.

## What sets you apart from your peers this year and why?

Our success has been based on a continuous effort rather than action taken on a one-off or annual basis. The decision to focus on developing our business in Geneva has set us apart from our competitors. Our in-depth knowledge of the specific characteristics of the region (property market, taxation, etc.) gives us a significant advantage over our competitors who concentrate on several different markets.

We are also one of the few independent management companies in Geneva to provide all the expertise required to meet the needs of individuals, foundations and families alike. We are also independent in the sense that we are not under any obligation to sell products. Our value-added is also based on three fundamental ideas: sharing of best practices, cooperation between our different groups of clients and syndication of transactions. Moreover, we manage a limited number of families, allowing us to guarantee high-quality services and high availability.

## How have your colleagues contributed towards the success of your organisation?

At Telomere Capital, we strive to meet the needs of our clients, offering them the utmost availability and keeping the channels of communication open at all times, ensuring that our services are always accessible. This is achieved thanks to the faultless commitment of our entire staff. Each and every staff member is determined to contribute towards the success of our business, striving to take an active part therein: listening to our clients, understanding complex problems and responding within 24 hours, but also either applying their own technical expertise or seeking the expertise of other members of the team. Our

clients know the name and role of each staff member. This means that they are in touch not only with their account manager, but with the entire team.

## What are going to do to stay on the front foot in a fast-growing but also challenging region such as this?

More than three quarters of our clients live in Geneva (81 per cent), one of the most important wealth management centres in the world. Concentrating on this highly competitive region was a strategic choice that has contributed greatly towards our success. The thing that helps us grow the most is active recommendations from our existing clients. They are our best ambassadors, effectively bringing in new business. Today, we are the external wealth management firm in Geneva with the highest growth in terms of the value of assets under management (AuM) with our main depository bank. However, it is also a question of expertise. By way of example, with the same bank, we generate portfolio management performance that is superior to that of our peers in the fixed income category in US dollars.

## What have been the challenges you have had to overcome to reach such a standard?

When we launched Telomere Capital in 2015, 100 per cent of the clients we had been managing at our previous bank followed us on our new adventure. The greatest challenge lay, therefore, in maintaining our client base. Now, more than five years later, 96.8 per cent of our clients are still with us and the majority of them have proven their satisfaction by repatriating with us assets that were being managed by other establishments. That client base has also increased by 14 per cent, thanks purely to recommendations from our existing clients. Another huge challenge facing a structure such as ours is knowing how to maintain a high level of operational efficiency. It is important not to simply accumulate different software, but to create synergies between them. Telomere Capital uses three major technological resources to provide its clients with an efficient and robust service.

## Whom do you look to for inspiration and ideas?

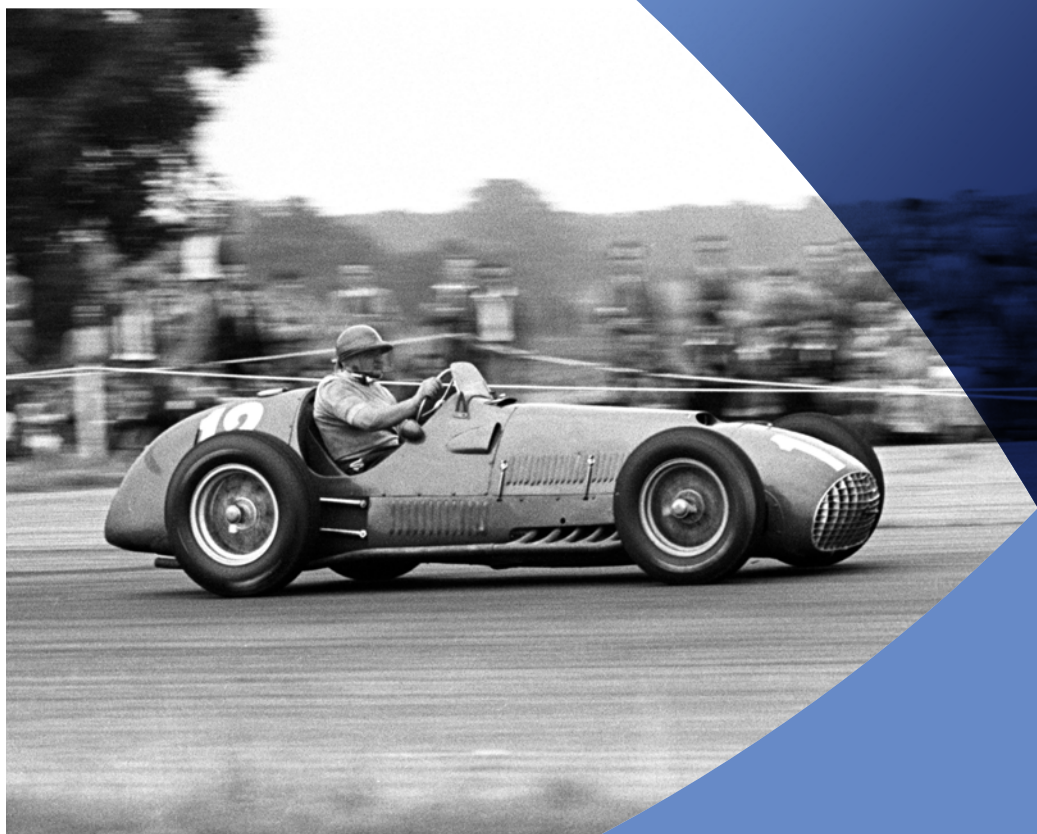
As management and investment professionals, we have our ear to the ground, constantly monitoring what is going on in the markets

and the industry. Exchanging and challenging points of view internally and with our partners (banking, legal, IT, etc.) also helps us to keep our thinking fresh. Certain demands from our clients force us to question ourselves, making us take a step back in order to find new ideas and implement new solutions.

## What do you hope will be the result of receiving this accolade? How does it help your business in this region?

The awards serve as a guarantee for our clients, our peers and our partners. They demonstrate that we have a high range of skills at our disposal, that we offer a high-quality service and that we respect the laws and regulations in force. When these accolades are given by an institution that is recognised by the industry as a whole, they are all the more valuable. The three awards we have received from *Wealth Briefing* in the "Client Service," "Innovative use of Technology" and "CEO" categories will allow us to enhance our reputation even further, locally and farther afield. We can promote these accolades among our existing and prospective clients, in the hope that this will reinforce their trust in us. For us, the satisfaction of our clients remains our biggest reward. This award gives us confidence in how we do things. ■





# The spirit of performance

Telomere Capital provides private clients, such as individuals, families, executives and entrepreneurs, with wealth management, investment advice, personalized financial planning and family office services. Because each life situation is unique, we offer you a comprehensive and tailor-made approach.

Wealth Management  
Family Office  
Financial Planning

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