WHY WE DO WHAT WE DO

PB

Philippe H. Berthoud
FOUNDER & CEO

One partner, clear responsibility
We do the core ourselves and oversee best-in-class partners for the rest.

Simple and transparent
Four building blocks. You see the volatility and the expected performance.

A long horizon
We serve families who think in generations.

Swiss base in Collina d'Oro
Swiss stability, in the hills above Lake Lugano.

OUR PARTNERS

In safe hands and good company

CUSTODIAN	Partner bank
INVESTMENT PLATFORM	TIM-Group.Swiss
LISTING	Exchange
RISK MANAGEMENT	Partner
INVESTMENT PARTNERS	Partners
TAX & LEGAL	Partners

CONTACT

Speak with us in confidence

YOUR CONTACT
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MJ GROUP & ASSOCIATES S.A.
SWISS PARADISE

MJ GROUP
FAMILY OFFICE

MJ Group & Associates S.A.

INVESTMENT ADVISORY
FAMILY ADMINISTRATION

Swiss Paradise

COLLINA D'ORO · TICINO · SWITZERLAND

WHAT WE DO

Make or Buy

The Investment Office from A to Z is our own job. Everything else comes from best-in-class partners.

MAKE in-house

Investment Office A–Z
Strategy, portfolios and reporting.

Daily administration
The everyday paperwork of the family.

Real estate
The family's properties.

BUY best-in-class partners

Tax, estate & succession
Specialists we select and oversee.

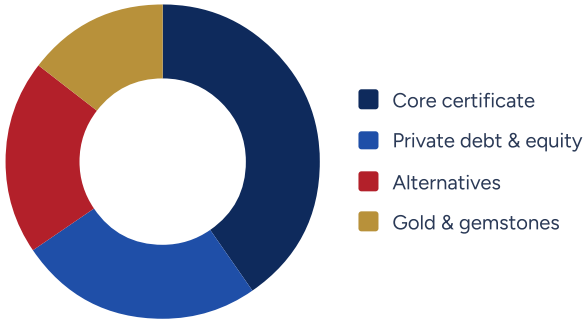
Philanthropy
Through trusted partners.

Lifestyle, concierge & security
Personal services, overseen by us.

OUR INVESTMENT OFFICE

The base strategy

> Diversification is the only free lunch in finance.
>
> Harry Markowitz



LOW VOLATILITY
Little correlation to the traditional markets.

REAL ASSETS
Private markets, real estate, gold and gemstones.

STEADY INCOME
Several income sources combined in one strategy.

YOUR PORTFOLIO

MJ Portfolio Box

Four building blocks. Choose the mix, and you see the volatility and the expected performance.

BOX 1 — MJ Core Certificate	40%
BOX 2 — Private Debt & Equity	25%
BOX 3 — Alternatives	20%
BOX 4 — Gold & Coloured Gemstones	15%

VOLATILITY
X.X

EXPECTED PERFORMANCE
X.X%

INCOME P.A.
CHF ...

> Simplicity is the ultimate sophistication.
>
> Leonardo da Vinci

How it works: pick your mix together with us, sign the order form, and the bank does the rest.