

LARS OBERLE

CEO

A Forerunner & Specialist in Asset Management by Leveraging Unparalleled Networking Skills

With increasing awareness about investment, people nowadays are seeking to invest in different prospects. From stocks, bonds, to real estate, master limited partnerships, and more, the options are limitless. With the increase in demand, there has been a sharp increase in asset management companies. These firms address all the issues faced by individuals and help them sail through the investment journey. By investing pooled funds from clients, these companies deliver a high-quality experience.

Finanz Konzept AG is among such fine institutions that offer exclusive services to clients looking to invest. The clients are guaranteed to receive tailored services addressing their specific needs. The company employs innovative products and sustainable asset management solutions which are characterized by concentration processes and increasing anonymity.

Finanz Konzept AG convinces clients as a personal and flexible boutique Multifamily Office in the heart of Zurich. It will manage all clients' assets as well as act as a consultant for better customer experience. The company is always with clients from retirement, inheritance to tax, legal matters, along with assistance in finding the right solutions for everything that makes life more comfortable and pleasant – Family Office & Lifestyle Management Services.

With its vast network, Finanz Konzept AG will ensure professional and competent support while monitoring clients' finances all the time.

STELLAR LEADERSHIP

At the helm of Finanz Konzept AG is Mr. Lars Oberle – Founder, CEO, & a Visionary leader. Under his leadership, the company has grown several folds. As in the financial industry, processes are constantly being automated, digitized, and standardized, Mr. Oberle has kept abreast of these developments. While services are being cut back and the focus is on shareholder value and no longer on individual client needs, he focuses on what is more important.

“We focus on individuality, continuity, and personality and are constantly expanding our services by strengthening our external partner network and specifically looking for employees who support our ambition as a one-stop-shop in the high-end segment and contribute to our unique working atmosphere. We also rely on digitalization and outsourcing of processes but only if this improves or at least does not affect the customer experience,” asserts Mr. Oberle.

It is all about finding the right mix between individuality, performance, and lean management and Mr. Oberle has a sound understanding of these aspects. The range of external service providers available to create a lean but very powerful service provider has rarely been as diverse and professional as it is today. It has been always a challenge to select and combine the right partners, but under his leadership, the company is pretty confident that it has found an ideal size and the right setup. Not to be forgotten is Zurich as a base, where nowhere else in Europe the knowledge and experience of all aspects of wealth management is better concentrated.

DYNAMIC PERSONA DRIVING THE SUCCESS

Mr. Oberle – 46 years old, studied economics in Frankfurt specializing in Finance & Management and holds a university degree in International Financial Market and International Banking.

At the age of 26, he founded his first companies with a focus on real estate and asset management. In 2001, he founded Finanz Konzept AG based in Zurich, which is now more successful than ever before. He is a proven expert in, global macro strategies, fixed income, and real estate investments. Most recently, he established an investment foundation for pension funds with a focus on real estate developments in Switzerland.

“I decided at the age of 26 to build and develop my own companies in Switzerland and Germany. It requires a healthy amount of self-confidence and self-motivation to survive difficult phases and to learn from failures. In the end, it is the experience that counts, mixed with out-of-the-box thinking and willingness to change,” states Mr. Oberle.

TAILORED SERVICES ADDRESSING ALL OF THE CLIENTS' REQUIREMENTS

As a smaller and more flexible asset management boutique, Finanz Konzept AG has always succeeded in adapting to the market and aligning itself to its strengths. Starting with traditional and independent asset management solutions, Finanz Konzept AG has developed into an innovative multi-family office and covers the following business divisions: Asset Management, Family Office Services, Lifestyle-Advisory, Financial & Tax Planning, and Real Estate Investments in Zurich.

In the future, it will be focusing more on its consulting services and increase its workforce in these areas. The ultimate goal of its services is to increase the most valuable asset for its wealthy clientele: Time. Time for hobbies, for self-realization, or the family.

Finanz Konzept manages the coordination, selection, and monitoring of selected providers, to offer the entire range of services from a single integrated channel. From planning and definition to the implementation of various solutions, Finanz Konzept takes care of the individual client's needs. Thanks to its independence and open architecture, there are no limits to the possibilities.

 **Business Sight's**
Visionary Leaders
At Forefront Of Entrepreneurship
2020



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