

# KALEIDO

## COMPANY SNAPSHOT

January 2023



**BEST BOUTIQUE BANK IN SWITZERLAND 2021**

# Kaleido Private Bank in a nutshell

Kaleido is a Swiss award-winning boutique private bank focusing on wealthy individuals and their families, entrepreneurs, family offices and financial intermediaries. Its mission is to offer state-of-the-art financial solutions to their clients by innovating future-proof products and services and by leveraging their extensive network.

## Comprehensive services across planning, investing, lending and banking — all what you need from a private bank

Investment Portfolio Solutions  
Private Market Investments  
Digital Assets Solutions  
Credit & Lending Solutions  
Transaction Banking Solutions

Investment Advice  
Real Estate Advice  
Inheritance & Pension Planning  
Wealth Planning  
HNW-Family Advice

### Highlights & USP

- ❖ Extraordinary investment offers (e.g. inflation protection, drawdown limitation, longevity)
- ❖ Complex financing (e.g. single stock lending, crypto lending, large mortgages, private equity lending)
- ❖ Digital Asset licence and deep crypto expertise

### Regions served

- ❖ Switzerland
- ❖ Europe (mainly Germany, Austria)
- ❖ Asia (mainly north-east countries)

### WHO THEY ARE

Kaleido are trusted advisors, wealth experts and forward thinkers who are designing the entire private banking relationship around the uniqueness of each client. They offering them meaningful advice for today, tomorrow and future generations.

### WITH WHOM THEY WORK

Kaleido works with innovators, entrepreneurs, industry leaders, thought leaders and progressive minds to help them achieve what they envision and to make a difference for them. They will move mountains to meet what the moment calls for.

## General information

Incorporation: 1997  
Headquarters: Zurich, Switzerland  
Employees: 35  
Regulator: FINMA, Switzerland  
Tier-1 ratio: 19% | Leverage ratio: 7%

## Links and Contacts

Website

[www.kaleidoprivatbank.ch](http://www.kaleidoprivatbank.ch)

LinkedIn

<https://ch.linkedin.com/company/kaleidoprivatbank>

Support

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