PRIVATE BANKER INTERNATIONAL

Global Wealth Summit and Awards

2020 SPECIAL REPORT

Meet the executives and institutions pioneering innovation in the private banking sector.

Highly Commended / Taurus

Ready for all investments come bull or bear markets

TAURUS FAMILY OFFICE

Investment options and mechanisms change over time for high net worth (HNW) clients. But Taurus Wealth Advisors is ready for bear markets, as much as it is for growing bull markets, thanks to its diverse range. This is why it received a **Highly Commended (HC)** recognition at the 30th annual PBI Global Wealth Summit & Awards 2020 in the **Most Effective Investment Service Offering category**.

Taurus Wealth Advisors in Singapore offer a wide variety of local, regional and global investment options and instruments and other non-market services via their partner network, covering.

(i) Public Market Investments: portfolio construction is bespoke and best suited to each client, with an incentive structure in place to reward advisors for adhering to this. Being bank and product agnostic helps keep the focus on clients' risk-reward objectives, using only the most suitable options from multiple paths to market.

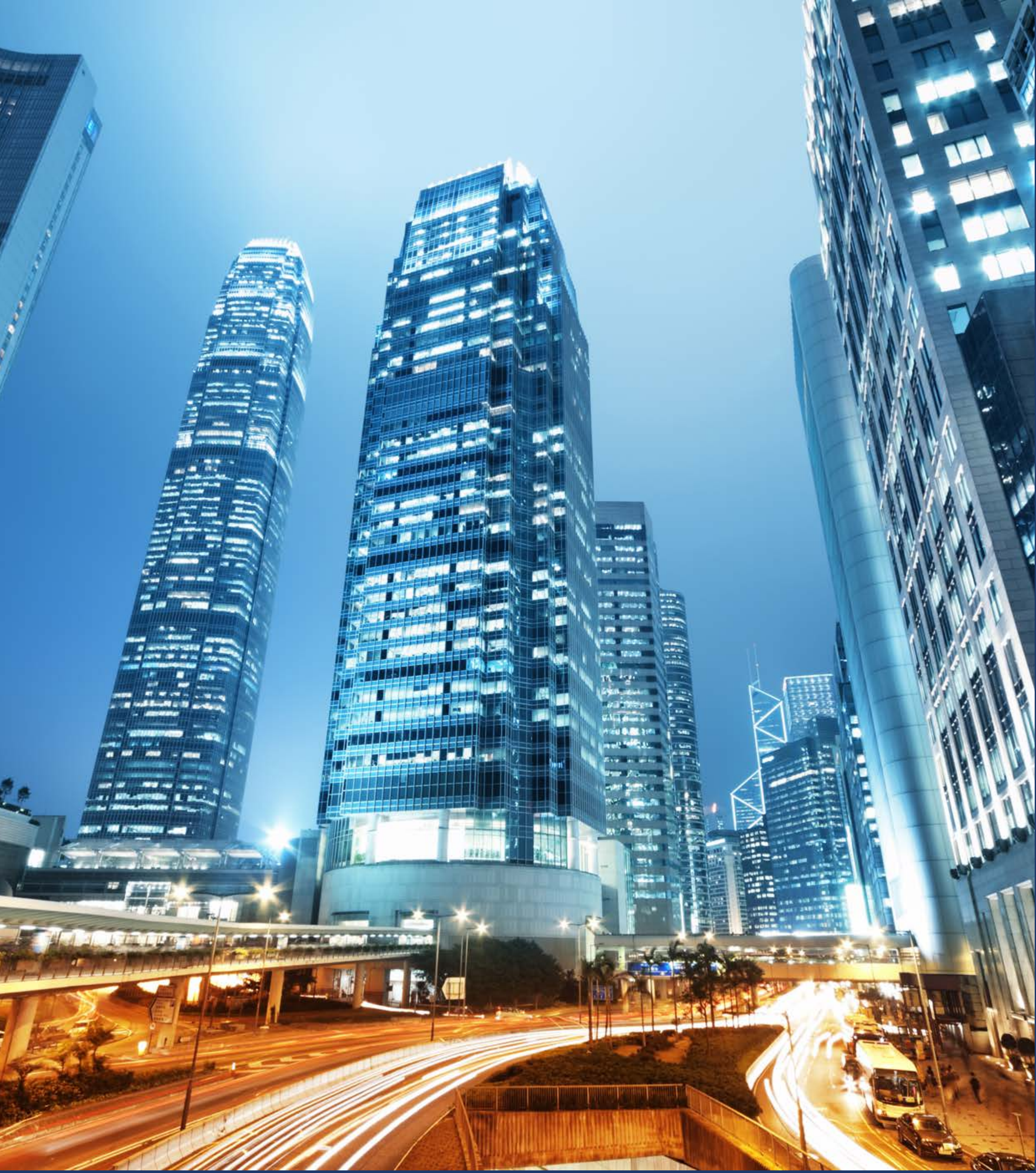
o A team of experienced Financial Advisors act as gatekeepers & contact points for clients.
o Supporting advisors is a team of specialist Investment Counsellors with global and regional expertise across all the various traded asset classes. Appearances on prime business channels and industry forums accentuate the firm's thought leadership.
o An institutional pedigree back office and client servicing infrastructure ensures efficient and timely execution and reconciliation of trades.

(ii) Private Market Investments & Collectibles: Certain clients want to invest in disruptive high growth areas, such as the tech-led Internet of Things (IoT) arena, while others are interested in art cataloguing, storage, valuation and insurance solutions – all available via partners. Taurus caters for this, family office wealth management, and a diverse range of other needs, such as real estate opportunities or pre-investment due diligence.

o Clients get priviliged access to a steady flow of private equity and debt opportunities spanning the risk spectrum from early stage to pre-IPO investments.
o Execution in this space is entrusted to a carefully cultivated network of access partners and service providers, which follow-on from advisors' recommendations.

(iii) Consolidation, Holding and Governance:
Investment information from multiple sources is used to assess and analyse individual portfolios and ensure appropriate risk-reward parameters and holding mechanisms, which may be a trust, company or fund.

o Family governance partners help with all legal and other dynamics involved in intergenerational wealth transfers, which is especially pertinent in the Asia market.



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