



CPS Wealth Management

Financial Planning & Wealth Management for the Global American

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INTERNATIONALLY FOCUSED

Independent Financial Solutions

United States / Switzerland

CPS Wealth Management is an international, independent financial services company advising



Financial Planning and Understanding for the American Expat

Who We Are

About Us

Our Approach

Management

Our Background



address the growing needs of international families seeking U.S. investments and custody. Since then, we have evolved into an international wealth management firm catering to global families including Americans expatriates, non-Americans with U.S. connections and clients who require an international perspective.

Financial Planning Across Borders

What We Do

Financial Planning

Wealth Management

Immigration & Expatriation Planning



Cross-Border Financial Planning

We work with American expatriates and global families to craft a highly customized financial plan with well-defined goals following the guidelines set up by the Certified Financial Planning Board of Standards. Life is not static, nor is a financial plan. Through ongoing discussions and reviews, we will help you navigate the challenges and opportunities that life brings; keeping you on track toward your financial goals .

Financial Planning Services

- Cross-Border Investment Management
- Retirement Planning
- Education Planning
- Insurance Planning
- Trust & Estate Planning
- International Taxation & Tax Planning
- Home & Investment Property Purchase Analysis
- Gifting & Philanthropic Strategies

Our Approach to Fees

Our services are rendered through a transparent fee structure. There are no lock-in periods or hidden fees. We view our relationship with you as a partnership and want you to understand how we work with you and for you. We offer hourly, project and flat fee financial planning services in addition to traditional asset based management fees. You can find our fee schedule starting on page 3 of our ADV below in Resources.



Client Center

eMoney

 **ShareFile**

 **Interactive
Brokers**

By selecting any external link on cpswealth.com, you will leave the CPS website and jump to an unaffiliated third party website that may offer a different privacy policy and level of security. The third party is responsible for website content and system availability.



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Capital Privé Suisse S.A. is registered with the United States Securities and Exchange Commission as a Registered Investment Advisor (CRD: 159909)

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Capital Privé Suisse S.A. is a member of the l'Association Romande des Intermédiaires Financiers (ARIF) in the Canton of Genève.

RESOURCES: CURRENT FORM ADV - PRIVACY POLICY - BUSINESS CONTINUITY

For additional information on CPS please refer to the SEC Website at www.adviserinfo.sec.gov CRD #159909

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