

Tailored Wealth Structuring Solution

Flexible investment solutions that preserve your control

Yield Solutions



INSURANCE KEEPERS
TOGETHER WE PLAN

TAILORED WEALTH STRUCTURING SOLUTION

Invest freely, without losing control

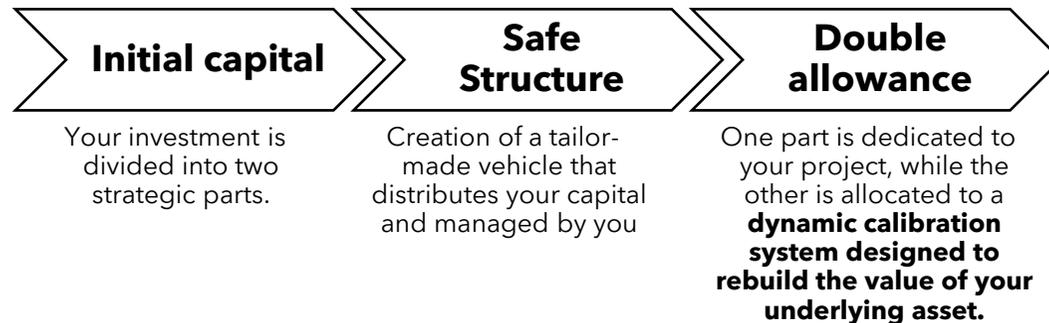
The solution that allows you to invest in the projects of your choice while protecting your capital. It is a Swiss legal and financial structure, solely managed by you, which combines investment freedom with a safety mechanism in the event of asset failure.

Investing means taking risks

We offer a compliant and secure wealth solution to develop your projects without compromising your objectives:

- ✓ **Capital loss**
- ✓ **Illiquidity**
- ✓ **Lack of visibility** in the event of an adverse event

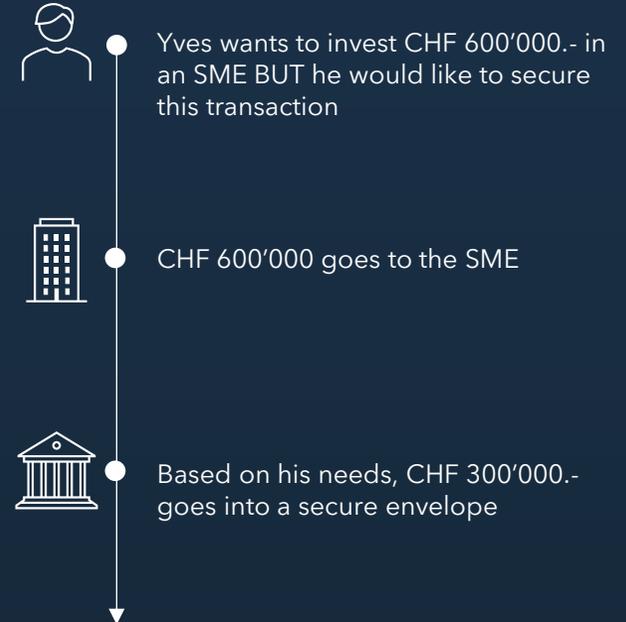
Structure to secure



Yield Solutions

 **INSURANCE KEEPERS**
TOGETHER WE PLAN

Example



This arrangement ensures added value on his term investments.

Even if the SME goes bankrupt, Yves recovers his capital thanks to the structuring.

TAILORED WEALTH STRUCTURING SOLUTION

Preserving Your Capital Are The Basis Of Our Success.

We empower wealth planning professionals to deliver tailored investment structures that combine capital protection and enhanced returns, leveraging custom-built vehicles dedicated to you and your investments.

- ✓ Capital protection through best-in-class specific processes
- ✓ Optimized returns even if the initial asset goes default
- ✓ Tailor-made solutions for each project
- ✓ Can be used for multiple deals over time
- ✓ Flexible deployment across multiple opportunities
- ✓ Client-owned and managed
- ✓ Full control and replicability: one vehicle, many projects, compound effect
- ✓ Rely on top-tier institutions

Case Studies

Asset Protection Service						
Leveraged Buy-Out (LBO)	Managed buy-out (MBO)	Joint-Venture	Early-Stage	Growth Expansion	Structured Mezzanine	Real Estate Development
Strategic Buyout of a Professional Legal Services Firm by a Private Investor	Management Buyout of a Media Agency Backed by a Hybrid Capital Structure	Joint-Venture Financing in Renewable Infrastructure	Early-Stage Investment in a High-Growth Medtech Startup	Growth Equity for a Human Resources Leader	Structured Mezzanine for Strategic SME Expansion	Secured Development in Commercial Real Estate

Discover our case studies in detail at www.yieldsolutions.insurancekeepers.com

TAILORED WEALTH STRUCTURING SOLUTION

We are here to support you.

We work alongside private wealth holders and family-led structures to preserve the value of their investments and long-term commitments particularly in complex, exposed or sensitive environments.

Our approach combines strategic intelligence, bespoke protective measures and rigorous risk oversight to ensure the stability, performance and integrity of your capital across all exposures.

Management Team



Cédric SEVAZ

15 years of experience at Big Four Companies in Switzerland. Expert in financial structuring and taxation.



Pierre-Louis LE GOUIC

Private Engineering specialist. Demonstrated history in developing bespoke solutions.



Alexis ATERO

Significant experience as financial controller, over seeing strategic financial planning and corporate governance.

Yield Solutions



Our Partners

We work exclusively with partners recognised for their reliability and solidity:

- ✓ **AAA-rated financial institutions**
- ✓ **Recognised structured issuers**
- ✓ **Swiss trustees and lawyers**
- ✓ **Big4 audit firms**

J.P.Morgan

 **SOCIETE GENERALE**
Corporate & Investment Banking



AG2R
LA MONDIALE


SwissLife
Banque Privée



Goldman Sachs

 **BOREL & BARBEY**
AVOCATS 1907


FINANCIAL KEEPERS
TOGETHER WE PERFORM

Tailored Wealth Structuring Solution

Flexible investment solutions that preserve your control

Insurance Keepers SA

Bd Georges-Favon 28
1204 Geneva - Switzerland

+41 (0)22 552 88 68

info@insurancekeepers.com

www.yieldsolutions.insurancekeepers.com

Yield Solutions



INSURANCE KEEPERS
TOGETHER WE PLAN