



*"An investment strategy is the implementation of common goals and visions."*

## Daniel Waldmeier

Swiss Certified Financial Analyst and Asset Manager  
Swiss Certified Expert for Accounting and Controlling

Partner | Head of Asset Management Department

Daniel Waldmeier has more than 30 years' experience in international banking and finance as analyst, portfolio manager and client advisor. During this time he has accrued a broad understanding of all key financial instruments and their use in diverse investment strategies. His experience is long-established in the fields of enterprise valuation, financial analysis, financial reporting and controlling. He was head of international portfolio management at a Swiss private bank.

Daniel Waldmeier counsils both demanding private and institutional clients in all questions of capital formation and the definition of appropriate, customized investment strategies through diverse life cycles. As part of asset management he heads the investment office and is responsible for the investment decision process, business analysis and the valuation of financial instruments within the framework of investment strategies.

### Practice Areas

Portfolio Management | Investment Office | Fundament and Technical Stock Analysis | Business Analysis | Corporate Valuations | Investment Strategies | Investment Decision Process | Analysis of Financial Instruments

### Education

Swiss Certified Financial Analyst and Asset Manager 1994 | Certified EFFAS Financial Analyst 1994 | Swiss Certified Expert for Accounting and Controlling 2013

### Languages

German | English

### Membership

Swiss Association of Asset Managers (SAAM) | Swiss Professional Association for Accountancy, Controlling and Financial Reporting

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