

## LAKEFIELD PARTNERS: Short Company Profile

### Independent Asset Manager with Long-Term Goal

- FINMA-supervised, strongly growing firm with sizable team
- Fully owned by the Partners of the firm and managed with an owner's mind-set
- Goal to be one of the best asset management firms in the market
- Client satisfaction based on superior services is a top priority
- Compliance processes fulfil current requirements
- Cross-border business according to today's standards exists and can be further grown

### Experienced and Competent Client Team

- Eight team members working with Swiss and international private and institutional clients.
- Team approach: We support each other where needed
- Focus on discretionary mandates and fund solutions

### Top Portfolio Management

- Core competence in the two most important investment decisions: Asset allocation and stock picking
- Nine core strategies (mandates), six UCITS funds, six client solutions
- Very strong track record of core strategies / funds / client solutions
- Investment decisions are supported by comprehensive, proprietary software which is in operation since 2002
- Objective of every investment strategy: First quartile results in the relevant fund peer group
- We received five Awards by the business magazine BILANZ; three 1<sup>st</sup> ranks in the last three years
- Most core strategies, all funds and all client solutions available in reference currencies CHF, EUR, USD and GBP

### Comprehensive Client Acquisition Support

- Full set of documents supporting client acquisition (strategy factsheets, presentations, reviews)
- Active support from management team for client acquisition
- Legal and Compliance support function in-house

### Integration of New Team Members

- Successful recent integration of the team of another independent asset manager
- Regular training sessions to stay up-to-date

## **LOOKING FOR NEW TEAM MEMBERS: What we offer**

Open positions for Client Relationship Managers in the rank of a Director

Highly professional working environment

- Team members with strong know-how in many areas
- Modern infrastructure, for example with portfolio management and client relationship management system
- Attractive office, with good access to public transportation
- Entrepreneurial and team spirit

Exceptional offering (mandates/funds/client solutions)

- Strong track record, full set of marketing documents
- Usage of own strategies allows for avoiding a second layer of fees, leading to higher net performance for clients
- Special conditions at some of the leading banks

Client-focused business

- No product sales targets
- Administration is kept to the required minimum and supported by IT-applications and Operations team

Uncapped financial upside

- Relationship managers receive a fixed share of the revenues they generate without any cap

## **NEW TEAM MEMBERS: What we are looking for**

Experienced client relationship manager

- Several years of experience in acquiring and servicing clients
- High professional standards
- Client-focused as well as scalable business approach

Sizable client base

- Private and/or institutional, Swiss and/or international
- Tax-compliant assets only

Personal attributes

- High level of personal integrity
- Business- and client-focused as well as service-oriented
- Entrepreneurial and team spirit
- Discipline
- Meritocratic, with preference for success-based compensation

Female or male of 30+ years