ASSET MANAGEMENT "PLUS"

Professional Finance Broker from Switzerland

Insurance Contract and getting the insurance portfolio

Life insurance review in compliance with fiscal and legal issues

Positive aspects for Partner

Possible risks	_ Liability for transfers – exemption of consulting risks _ Confidence in compliance with legal and fiscal issues _ Confidentiality
Maintenance and management	_Professional services on general insurance matters _ Implementation of standard procedures regardless of the insurance company _ Reduction of the administrative costs _ Meetings with clients are conducted by professional consultants _ Management/Storage of all documentation (higher safety standards)
Optimization	_ Focus on core business _ Expanding of the offered services at no additional cost _ The elimination or adjustment of the provisions of the contract _ Right of retention
AM PLUS Ltd.	_ Know-how in the field of insurance and taxation _ The possibility of getting the consultant's services _ Professional support during and at the expiration of the contract

Implementation

Required documentation	_ Letter of attorney (signed by the insured person, the client) _ A photocopy of the passport

Benefits for the insured person (the Client)

Risk Analysis	_ Confidence in compliance with legal and fiscal issues _ Alignment with the new regulatory framework (update procedure)
Maintenance and management	_ Professional services _ Professional services on the insurance matters _ Control and audit of the changes/documentation _ Management/storage of all documentation _ The possibility of getting the consultant's services _ Advising and providing alternative solutions
Legal support of insurance cases	_ Insurance on survival or death
Determination of the content and the form of the contract	_ Optimization or adjustment of provisions of the contract _ The ability to improve tax exemptions

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