

Quam Wealth Management



- ★ Independent advisory services of customized financial solutions and protection
- ★ Serves mid-market individual and corporate clients, who do not have the capital for high-end private banking services but demand more personalized wealth planning services
- ★ Extensive partnership with world-class mutual fund houses and insurance groups

Financial Planning

The comprehensive financial planning services of Quam Wealth Management (QWM) assist clients to define, plan, execute, and regularly review their objectives in different stages of life through appropriate management of financial resources.

- Offshore Funds Savings Plan
- Portfolio Management
- Customized Investment Services
- Children Education Plan
- Retirement and Estate Planning
- Asset Protection and Trust Service Arrangement
- Tax Planning Arrangement
- Employee Benefits & MPF
- Other services include CIES

Investment Management

- Gives professional investment management services
- Tailor-makes the optimized risk-adjusted portfolio from a variety of investments such as mutual funds, equities, bonds, etc.
- QWM's performance fee is linked to the client's assets growth

Wealth Creation

- Well-devised plans with diversified investment strategy that effectively reduce investment risk
- Unlimited fund switching that allows for the most effective fund portfolio rebalancing

Customized Investment Services

As part of the investment strategies that QWM devises for clients, it arranges:

- Trading of securities (including Hong Kong and overseas markets)
- Trading of derivative futures contracts
- Application for IPO and new issues to supplement investment portfolio of funds.

Risk Protection

- Recommends and designs protection plans from a carefully chosen group of reputable and financially sound insurers
- Offers comprehensive insurance services including life, income, protection, critical illnesses, annuities, medical plans, accident and general insurances