



Structured Products in Wealth Management (Wiley Finance)

By Steffen Tolle, Boris Hutter, Patrik Rüthemann, Hanspeter Wohlwend

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- Structured products in the form of equity-linked derivatives have seen a rapid rise in popularity in the field of wealth management.
- Structured products are combinations of derivatives and traditional financial instruments such as stocks and bonds. The various components are combined into a single financial instrument and securitized.
- Discusses the characteristics and practical applications of structured products.
- In addition to providing a description of the structured products, this book focuses on their practical applications, showing how they can generate added value as part of an integrated investment process.
- Colourful charts help present the material in an attractive, real-world context.

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Editorial Review

From the Inside Flap

Structured products in the form of equity-linked derivatives have seen a rapid rise in popularity in the field of wealth management. As their usage becomes more widespread, so has the need for a better understanding of how they work in a portfolio context.

Structured Products in Wealth Management is a practical and efficient guide to the use of structured products in portfolio management. It provides a comprehensive description of structured products and their practical applications. It also demonstrates how they can generate added value as part of an integrated investment process and illustrates its systematic use in daily portfolio management. Experience in everyday investment practice shows that selecting and combining innovative new products at random is rarely a recipe for successful investment management.

Structured Products in Wealth Management is the title of the English translation of the original book *Strukturierte Produkte in der Vermögensverwaltung*, previously published in German (3rd edition), French and Italian. The English-language version has been fully reworked and adapted for the English-speaking and international markets. Colorful charts help present the material in an attractive, real-world context.

Written by a team of derivative specialists, the book addresses itself to investors, wealth managers, client relationship managers, students, as well as anyone with an interest in the financial markets. All four authors have long-term experience and know-how in developing and using structured products in wealth management.

From the Back Cover

A worthwhile guide on the use of structured products in private wealth management, written in a very accessible style. This book should be of value to all retail private investors and their advisors. - **Professor Moorad Choudhry**

Over recent years, structured products have increased in their diversity and complexity whilst becoming more readily available to the individual investor. Beyond basics, *Structured Products in Wealth Management* facilitates their practical application by clearly articulating how they work and how they can be incorporated to strategically optimize an investment portfolio - a valuable resource for anyone involved in the financial markets. - **Brendon C.W. Seeto**

This is an excellent book explaining the use of derivatives and of structured products in wealth management by highly successful pioneers in this use. This book is written at a level that makes it helpful to investors as well as to investment advisors. It will not only help them avoid mistakes, but more importantly make better use of financial instruments to achieve their investment objectives. - **Professor Rene M. Stulz**

About the Author

Dr. Steffen Tolle studied business administration at the University of St. Gallen, majoring in finance and accounting. He completed his PhD in 1993 with a dissertation on "Dynamic Hedging Strategies with SMI Futures." After joining Wegelin & Co. Private Bankers in 1991, he took over as head of Products and Trading in 1996. He has been a managing partner since 1999. Today he is head of Advisory and Wealth

Management at Wegelin & Co.

Boris Hutter joined Wegelin & Co. Private Bankers in 2001 after studying economics at the University of St. Gallen with a major in finance and capital markets. He is involved on a daily basis in the launch of new structured products.

Patrik Ruthemann, CFA, studied business administration at the University of St. Gallen. After completing his studies he joined the Structured Products department of Wegelin & Co. Private Bankers in 2000. Today he is head of Products and Trading and became a managing partner in 2007.

Dr. Hanspeter Wohlwend studied business administration at the University of St. Gallen, Majoring in banking. In 2001, he completed his PhD in financial market theory at the same university with an empirical study of the Swiss market for structured products. Since 1995, he has held various positions at Wegelin & Co. Private Bankers, including head of Investment Process and Portfolio Management. Today he is responsible for the bank's Operations as a managing director.

Users Review

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Virginia Carter:

This book entitled Structured Products in Wealth Management (Wiley Finance) to be one of several books in which best seller in this year, that's because when you read this publication you can get a lot of benefit on it. You will easily to buy this specific book in the book retail outlet or you can order it by using online. The publisher with this book sells the e-book too. It makes you more easily to read this book, because you can read this book in your Touch screen phone. So there is no reason to you to past this book from your list.

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