



Swiss Finance & Property Group

# We increase the value of your portfolio

Real Estate Switzerland, Direct Mandates



# Expertise with a modular system

Swiss Finance & Property Funds Ltd is a FINMA-licensed fund management company that brings together around 50 real estate and corporate finance specialists as part of an established and effective team.

We offer services relating to the management of properties that are held directly throughout their entire life cycle.

Mandates are taken on based on a real estate strategy that is used to define or adopt a business plan for implementation in consultation with the client. Depending on the focus of the business plan, priorities are assigned to our core areas of expertise in accordance with a modular toolbox system (basic and additional services).

In addition to regularly reviewed standards of best practice and well-developed governance, we offer our clients contemporary real estate management with a high standard of digitisation and reporting. As a UNPRI reporting signatory, we also focus on the implementation of sustainability standards as well as measures to reduce the CO<sub>2</sub> emissions of the properties we manage.



\* Basic services

\*\* Additional services

## Our specialists are as close to the market as they can be and operate as part of a network combining different fields

In the Direct Real Estate division, 50 specialists work in the fields of portfolio and asset management, acquisition, conversion, refurbishment and development.

**57**  
employees

**6473.8**  
million CHF AuM\*

**450+**  
properties

as at 31 December 2024

\*provisional values



### Portfolio Management

- Advice on portfolio strategy
- Long-term investment planning
- Reporting
- Communications



### Letting & Marketing

- Strategy development in the field of re-letting
- Management of the central advertising platform
- Periodic monitoring of advertisement quality
- Development of broader marketing measures



### Asset Management

- Development/implementation of property strategies
- Implementation of optimisation measures at the individual property level
- Administrative team management
- Active vacancy management



### Acquisition & Divestment

- Ongoing market monitoring
- Management/organisation of the entire selling process
- Structuring and managing the due diligence process
- Internal property evaluations



### Development & Construction

- Project/construction management and coordination
- cost control/construction administration
- submission management/contract management
- warrant overview/services



### USPs

- Powerhouse for real estate investments
- Independent and business minded
- Many years of experience with external mandates
- Outstandingly well-trained specialists
- Strong focus on acquisitions throughout Switzerland
- Switzerland-wide network for buying/selling properties
- Established best practice processes
- Development and implementation of a tailored portfolio strategy

# Your contacts



**Andreas Dal Santo**  
Head Direct Mandates



**Bruno Kurz**  
CEO Swiss Finance & Property Funds Ltd  
and SF Urban Properties Ltd



**Serafin Düring**  
Senior Asset Manager  
Direct Real Estate



**Bettina Koch**  
Asset Manager  
Direct Real Estate



Four decades of professional portfolio/  
asset management experience with direct  
property investments.



Expertise in the management and development of  
portfolios of directly held properties, with a focus on  
increasing the value of the portfolio. Long track record  
of development, planning and implementation.



MAS in Real Estate Management,  
Lucerne University of Applied Sciences and Arts  
Dipl. Real Estate Trustee  
Bsc. Facility Management,  
Zurich University of Applied Sciences



German  
French  
Italian  
English

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## Head Client Relationship Management & Marketing

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