

TAKING BESPOKE INVESTMENT TO HIGHER LEVEL

Lital Puller, founder and co-chief executive at CAPAnalysis, talks to **Tom Burroughes** of *WealthBriefing* about the firm's achievement.

What sets you apart from your peers this year and why?

Perhaps CAPAnalysis' most prominent characteristic setting us apart from our peers is that we are a boutique in the sense that we solely and exclusively address tailor-made requests.

Our unique way of supporting and assisting clients in optimising their investment returns sets us apart from others and our distinction is achieved by our ability to consolidate all of our clients' wealth. Wealth to us doesn't just mean portfolios or listed financial instruments, but also non-financial assets such as art, car collections, real estate or intellectual property. Our highly sophisticated software allows for the creation of detailed client databases, providing a consolidated as well as holistic view of their wealth.

How have your colleagues contributed towards the success of your organisation?

We are a cohesive team of financial professionals whose ultimate objective at CAPAnalysis is to provide comprehensive support to clients as they verify the execution of their own individual wealth management strategies by reference to their own unique criteria.

To reach this objective, we have developed and continue to develop CAPAct, an in-house suite of high-performance analytical tools. The implementation of this state-of-the-art software was made possible thanks to our team of IT engineers highly skilled in finance. This set of skills makes a fundamental difference when it comes to addressing clients' specific demands. Owning our system and being able to implement any request for fundamental, analytical or presentational changes at very short notice gives us an edge against our competitors.

What are you going to do to stay on the front foot in a fast-growing but also challenging region such as this?

The need for transparency and honesty currently is a major concern in the investment industry. As a result of our work with large law firms, specialised in arbitration of banking and

financial disputes, CAPAnalysis has been appointed Judicial Financial Experts by the Geneva Civil Court. We believe this appointment to be a second-to-none testimony of the excellence of our work and of its accuracy and integrity. It holds CAPAnalysis in high regard with clients in Geneva and internationally.

What have been the challenges you have had to overcome to reach such a standard?

A major challenge we consistently work on is always being ahead of future clients' demands. Today we supervise the assets of many clients and from time to time we notice performance concern patterns subtly emerge amongst the portfolios we monitor. We make it our mission to identify them precisely, in advance, in order to address future clients' concerns.

Another significant challenge is having to rethink and reform our reports to cater to our clients' needs better. Clients ask for an enormous amount of detail but can be quickly submerged by the volume of data. They have the need to be reassured that we have covered every aspect of their investments, but they lack the time to go over the numbers. It is our job to allow them to achieve this in the most efficient and thorough way possible. This is a lengthy process but paramount to not only our success, but our clients'. If the structure of reports impedes the client's ability to access his or her own information, the goal is missed. On the contrary, success is achieved when supplying the clients what he or she needs: Knowledge.

Whom do you look to for inspiration and ideas?

We have been lucky enough to cross paths with exceptional and unique individuals: senior professionals with leading roles in multinational corporations provide us with some of the most invaluable advice. These relationships are based on the potential they see in us and our capacity to grow at this early stage. Profound bonds and sincere human synergies have developed between us. Their guidance and insights are priceless. We are extremely grateful for the time they devote to us.

Inevitably, turning to our team also provides us with a huge spectrum of knowledge and inspiration. We value diversity enormously, and the different opinions it brings to the table.

What do you hope will be the result of receiving this accolade? How does it help your business in this region?

A sincere "thank you" is due to all our clients, who have placed their trust in us continuously for many years. We consider this accolade to be the recognition of our ability to provide "access to investment knowledge", meaning the knowledge that allows clients to challenge actively and constructively the investment strategies offered to them. We act as their partner, in charge of bringing the transparency they need to protect their financial interests and contemplate the evolution of their wealth with serenity.

In a financial environment that has never needed more clarity and objectivity, we've never been more determined to preserve and reinforce our mission. ■

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