

Invested In Providing Exceptional Service To Our Clients



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Established in Geneva in 1995, the Octogone group provides high-level personalised services and rigorous, tailor-made asset management. As independent wealth managers, we offer customised solutions to each client's personal situation, guided by impartial and independent advice. The Octogone group manages the assets of families and institutions with discretionary as well as advisory mandates, through a network of international specialists, based in Europe, USA, Latin America and the Middle East. The company also provides services in the field of portfolio analysis.

What was the winning formula of your firm that explains why you won?

The Octogone Group prioritises maintaining a deep understanding of international markets and economic trends. Our international team comprises professionals with over 30 years of experience in asset allocation and fund selection, having previously held leadership roles in major and leading institutions. Their invaluable insights contribute to informed decision-making, reflecting extensive experience in successful portfolio management skilled and selection both traditional and alternative products. Our focus on building strong, long-term relationships with our clients has been pivotal. Understanding their unique financial goals and tailoring our services accordingly has not only fostered client trust but has also resulted in client referrals, contributing to the growth of our international client base.

Please describe how your colleagues made a difference?

Our team consists of over 80 highly skilled and experienced professionals, hailing from 15 different nationalities and proficient in 10 languages. This diversity enables us to understand and cater to the diverse needs of our clientele, ensuring that we provide

personalized and attentive service at all times. Our unwavering dedication to client satisfaction has been key in cultivating a loyal clientele base. The human aspect is crucial; we are consistently striving to attract young talents to enhance our teams and facilitate a smooth generational transition.

What are you going to do to remain competitive and stay ahead?

To ensure our continued competitiveness and leadership in the industry, we firstly are committed to investing in the ongoing education and integrity of our team members to keep them abreast of emerging trends, technologies, and regulatory changes. By staying ahead of the curve, we ensure that our team is equipped with the latest knowledge and skills necessary to provide exceptional service to our clients. Then, we continuously invest in and adopt cutting-edge financial technologies to enhance our service delivery and provide clients with innovative solutions. Finally, we are committed to expanding our global network to strengthen our presence in key markets. In addition to our existing operational hubs in Switzerland, Miami, Nassau, and Dubai, we have expanded our footprint by establishing an office in Panama in 2023. This expansion allows us to better serve clients in diverse geographical regions and capitalise on emerging opportunities.

How do you hope your firm will benefit from getting this award?

The award serves as a testament to our commitment to excellence, boosting our reputation within the industry and among potential clients. This recognition also will make us an attractive workplace for top talent, further strengthening our team and capabilities. This may also open doors to new business opportunities and collaborations, further expanding our reach and influence in the global wealth management landscape.