



Aerial Wealth
Management



WE SET CLEAR FINANCIAL GOALS

HAVING A TARGET HELPS YOU STAY FOCUSED AND MOTIVATED ON YOUR JOURNEY

CORPORATE

WWW.AERIALWEALTHMGT.COM

PROFILE

ABOUT

Aerial Wealth Management

At Aerial Wealth Management, we transform the wealth management sector by offering innovative solutions customized for a global audience. Our committed team of over 70 experienced professionals catering to over 3,000 clients around the world. Our extensive range of services, which includes investment management, financial planning, and risk management, guarantees that we address the varied requirements of our clients.

www.aerialwealthmgt.com





The value of a financial advisor lies not only in their expertise but also in their ability to listen and tailor strategies to individual needs.

At our firm, we pride ourselves on delivering exceptional financial services that have established us as a premier private wealth management firm in Japan and beyond. Our dedicated team of seasoned professionals collaborates closely with clients to craft tailored investment strategies that align perfectly with their individual aspirations and financial objectives.

Our focus on innovation and client-centric service have made us a trusted partner for individuals and businesses seeking comprehensive wealth management solutions. Whether your goal is to amplify your wealth, safeguard your assets, or strategically plan for retirement, we possess the knowledge and resources necessary to guide you toward success. Experience the difference of personalized service and expert advice — your financial future deserves nothing less!

Join us on this journey to financial success and discover how our innovative wealth management services can help you thrive in today's dynamic market!

OUR APPROACH

Thorough Due Diligence

Our analysts conduct extensive due diligence, meticulously evaluating potential investments to ensure they meet our high standards. This rigorous process allows us to select only those investments we are confident will thrive, regardless of market conditions — be it bullish or bearish.

Decades of Expertise

With years of experience navigating the markets, our investment professionals have honed their skills in identifying quality investments. They possess an acute understanding of market dynamics and trends, allowing them to pinpoint opportunities that others might overlook.

Your Path to Success

We are dedicated to guiding you toward quality investments that align with your financial goals. Our mission is clear: to empower you with the knowledge and resources needed to move forward confidently on your investment journey.

Invest with Confidence - Let Our Experience Guide You Toward Quality Investments That Propel You Forward.



OUR SERVICES

Since our inception, we've skyrocketed in growth thanks to our meticulously crafted services. The secret? A steadfast commitment to long-term investing. Forget the temptation to chase fleeting market trends or hop on the latest investment craze. Instead, embrace the power of "buy and hold" — but remember, this isn't about buying and forgetting!

Your financial landscape can shift, just as companies evolve. That's why having a written investment plan is crucial. Partnering with a professional advisor adds an extra layer of objectivity, guiding you through the inevitable ups and downs of your investment journey.

Stay focused, stay informed, and watch your wealth flourish!



Expanding your business aligns with assisting you in expanding your capital. We can assist organisations with everything from hiring managers to establishing employee benefit schemes, supply chain sustainability to corporate social responsibility.



Long-term investment planning that supports you to meet your long-term aspirations. By minimizing expenses and choosing the right platforms/markets, we can help you maintain a level of confidentiality that protects your wealth from unnecessary scrutiny.



By placing investments where expenses are reduced as much as possible, you can take advantage of the benefits of protection, tax minimalization, and fiscal privacy. Investing in certain jurisdictions or through specific financial instruments can provide an added layer of privacy regarding your financial affairs.

OUR SERVICES CONT.

We carefully manage your assets by categorizing them based on your specific needs. Aim to allocate resources in a manner that maximizes benefits while minimizing tax liabilities.

By following these steps, you can effectively organize and manage your assets for optimal performance and tax efficiency.

Retirement Planning

Putting your future financial requirements first in a fail-safe plan now, to make your later years more comfortable.

Higher Education Planning

Bespoke planning that allows your child the greatest possible education and foundation for a successful life.

Estate Management

Organize your assets with care, and divide them according to your needs in the most fruitful and tax-effective way possible.



GET STARTED

Assessment of Needs: We begin by evaluating your financial goals and requirements. This will guide you in determining how to best distribute your assets.

Tax Efficiency: Consider the tax implications of each asset class. Different investments are subject to varying tax rates, so strategizing their placement can lead to significant savings.

Diversification: Ensure a balanced portfolio by diversifying your assets across different sectors and types. This not only mitigates risk but also enhances potential returns.

Regular Review: Periodically reassess your asset allocation to adapt to changing circumstances, such as market conditions or personal financial situations.



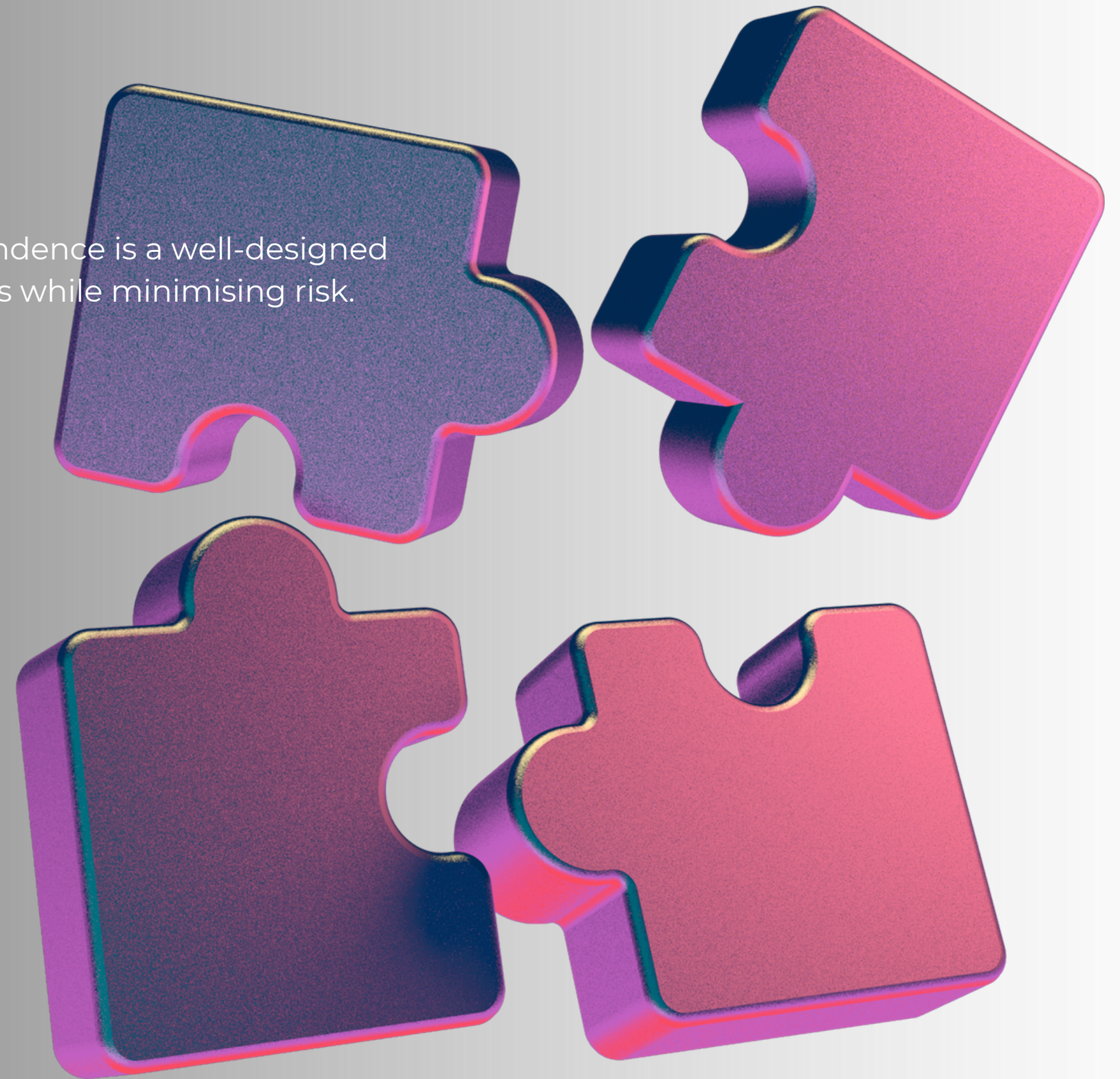
The Journey With Us

How we work

One of the most important requirements for gaining financial independence is a well-designed investment portfolio. It enables our clients to attain financial objectives while minimising risk.

Our advisors understand how difficult it can be to put together a long-term investment strategy; it's a process that necessitates the correct expertise and experience to take the right steps.

- The first step in planning for your future is to conduct a thorough assessment of your current situation. In other words, where do you stand now in relation to your future financial goals?
- The next stage is to figure out how much risk you're willing to take. What is your risk-reward ratio, and what are your desired returns? After this has been determined, the next step is to devise a strategy.
- Our experts will create an asset plan that is based on diversification to maximise returns while minimising volatility. Of course, as time passes and markets change, your plan will evolve. Whether you're planning to purchase property, establish a business, or retire in comfort, we'll make sure your approach prioritises what matters most.





Questions Illuminate the Path to Understanding. Connect with us to unlock your potential and achieve your financial aspirations.

Our mission is to empower individuals and families to achieve their financial goals through personalized wealth management solutions that prioritize integrity, transparency, and excellence in service.

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