

Information about qualifications of
Investment Adviser Representatives
of Belvoir Wealth Management AG

Part 2B of Form ADV

Brochure Supplement

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BWM is a registered investment adviser. Registration of an investment adviser does not imply any level of skill or training. The oral and written communications of an adviser provide you with information about which you determine to hire or retain an adviser. Additional information about BWM is also available on the SEC's website at www.adviserinfo.sec.gov.

Clients and prospective clients should review this brochure supplement carefully.

This brochure supplement provides information about the qualifications of Belvoir Wealth Management AG ("BWM") Investment Adviser Representatives. If you have any questions about the contents of this brochure supplement, please contact us. Additional information about Deepak Soni, Sabina Weber Sauser and Susanna Giase is available on the SEC's website at <https://adviserinfo.sec.gov/>

This brochure provides information about the following Supervised Persons of BWM:

- Deepak Soni, CEO, Managing Partner, and Member of the Board of Directors
- Sabina Weber Sauser, CIO Managing Partner, and Member of the Board of Directors
- Susanna Giase, Director, Senior Relationship Manager

Deepak Soni

CEO (Chief Executive Officer) and **Member** of the Board of Directors

Educational Background

Deepak Soni was born in August 1971 in the US. After high school, he received a Bachelor degree in Industrial Engineering from N.C. State University in 1994. Deepak Soni completed an Executive MBA program from Golden Gate University in San Francisco, CA in 2006. Deepak Soni has successfully passed the Series 66 exam, the Uniform Combined State Law Examination that covers topics relevant to providing investment advice and effecting securities transactions for clients.

Business Experience

Deepak Soni is the CEO of Belvoir Wealth Management (SEC) since June 2021.

Deepak Soni has over 20 years of financial services experience. Prior to arriving in Switzerland, Deepak Soni worked for Citigroup in New York and San Francisco in Business Development from 1999 until 2008. From 2008 until 2010, Deepak worked as Director for Credit Suisse Private Advisors (SEC) in Business Development. In 2010, he joined Vontobel Swiss Wealth Advisors (SEC) in Zurich as Markets Head for the U.S. region and became CEO two years later from 2012 until 2018. In 2018, Deepak Soni joined UBP Investment Advisors (SEC) in Zurich, where he took over the CEO position.

Disciplinary Information

There are no legal or disciplinary events to report.

Other Business Activities

Adjunct Professor for Golden Gate University.

Additional Compensation

Golden Gate University San Francisco CA.

Supervision

Deepak Soni, as BWM's CEO, reports to the BWM Board of Directors, consisting of Alexandre Weintraub, Chairman, Steffen Bauke, Sabina Weber Sauser and Deepak Soni himself. Deepak Soni is supervised by Katharina Stumm, CFA, BWM's Chief Compliance Officer, for any investment advice, he provides through BWM.

Each BWM employee has a responsibility for knowing and following BWM's policies and procedures. Each person in a supervisory role is also responsible for those individuals under his/her supervision. Supervision is ongoing and includes among other things account reviews, trade supervision, annual compliance reviews, including the forensic testing of firm systems, staff meetings and employee reviews. Katharina Stumm, CFA, Chief Compliance Officer ("CCO"), has the overall responsibility for monitoring and testing compliance with BWM's policies and procedures. Possible violations of these policies or procedures will be documented and reported by the CCO for remedial actions and/or sanctions to the appropriate supervisor, to the BWM Risk and Oversight Committee and/or to the BWM Board of Directors, depending on the repeated nature and/or seriousness of the violation in question.

Sabina Weber Sauser

CIO (Chief Investment Officer) and Member of the Board of Directors

Educational

Sabina Weber Sauser was born in January 1967 in Glarus, Switzerland. She is a graduate of the University of Applied Sciences in Zurich (1992). Mrs. Weber Sauser is a Certified EFFAS Financial Analyst (CEFA) (1994) and a member of the Swiss Financial Analyst association. In addition, she is a lecturer and fellow at University of Applied Sciences in Zurich where she teaches banking and finance related topics.

Business Experience

Mrs. Weber Sauser joined Belvoir Wealth Management in August 2021 as Chief Investment Officer. She has over 30 years of financial services experience and has been working throughout this time in investment management for private and institutional investors. Prior to joining Belvoir Wealth Management, Mrs. Weber Sauser worked as a Managing Director and Senior Investment Manager for UBP Investment Advisors SA from 2018 to 2021. From 2010 to 2016 she was the Chief Investment Officer for Vontobel Swiss Wealth Advisors AG. From 2008 to 2010 she was Head of Asset Management & Investment Process at AIG Private Bank (Falcon Private Bank). Prior to this experience, Mrs. Weber Sauser was managing the Curriculum at University of Applied Sciences in Zurich for their BSc in Banking & Finance from 2006 to 2007. She previously worked as Head of Portfolio Construction and Senior Fund Manager at Credit Suisse Asset Management from 2003 to 2006. From 2000 to 2003 she served as CEO of Swiss Life Fund Master AG. Prior to this experience she worked as Portfolio Manager for Banque Edouard Constant, Bank Vontobel and Swiss Bank Corporation (UBS AG) where she started her career in 1988.

Disciplinary Information

None.

Other Business Activities

Lecturer at University of Applied Sciences in Zurich, Board member of Ragotti & Weber group companies in Glarus.

Additional Compensation

University of Applied Sciences in Zurich, Ragotti & Weber group companies in Glarus.

Supervision

Sabina Weber Sauser is supervised by Katharina Stumm, CFA, BMW's Chief Compliance Officer, for any investment advice, she provides through BMW. Katharina Stumm, CFA can be reached at +41 43 244 75 50.

Each BMW employee has a responsibility for knowing and following BMW's policies and procedures. Each person in a supervisory role is also responsible for those individuals under his/her supervision. Supervision is ongoing and includes among other things account reviews, trade supervision, annual compliance reviews, including the forensic testing of firm systems, staff meetings and employee reviews. Katharina Stumm, CFA, Chief Compliance Officer ("CCO"), has the overall responsibility for monitoring and testing compliance with BMW's policies and procedures. Possible violations of these policies or procedures will be documented and reported by the CCO for remedial actions and/or sanctions to the appropriate supervisor, to the BMW Risk and Oversight Committee and/or to the BMW Board of Directors, depending on the repeated nature and/or seriousness of the violation in question.

Susanna Giase

Director, Senior Relationship Manager

Educational

Susanna Giase was born in June 1975 in Zurich. She began her career in 1992 with a commercial apprenticeship and additionally she holds a Financial Planner Certificate earned Zurich in 2003.

Background and Business Experience

She was initially in charge of the placements of subscription and redemption orders, providing operational support to relationship managers, trouble-shooting into management and reconciliation within the master custodian, broker and fund administrator. She was also in charge of recruiting new employees with knowhow. In order to deepen her banking expertise, Mrs. Giase joined in July 1999 Credit Suisse Private Banking as a junior relationship manager. She had the possibility to gather her experience in servicing ultra-high net worth clients. In 2001, she started at Maerki Baumann & Co. AG a family-owned private bank. She was able to deepen her knowledge in wealth preservation and develop new business areas within private banking. Due to her interest into specific topics, she was able to implement tailor made solutions such as international diversification as well as minimizing systematic risks into the clients' portfolios.

Since then she has been working successfully to develop new relationships and retain her existing client base within different institutions. In July 2018, Mrs. Giase joined Belvoir Wealth Management AG as a Director and Senior Client Advisor. Mrs. Giase speaks German, English, Italian and French.

Disciplinary Information

There are no legal or disciplinary events to report.

Other Business Activities

There are no other business activities to report.

Additional Compensation

Susanna Giase receives fees from the parent company Belvoir Capital AG for referring non-US Persons to Belvoir Capital AG. She does not manage or advise these clients.

Supervision

Susanna Giase is supervised by Katharina Stumm, CFA, BMW's Chief Compliance Officer, for any investment advice, she provides through BMW. Katharina Stumm, CFA can be reached at +41 43 244 75 50.

Each BMW employee has a responsibility for knowing and following BMW's policies and procedures. Each person in a supervisory role is also responsible for those individuals under his/her supervision. Supervision is ongoing and includes among other things account reviews, trade supervision, annual compliance reviews, including the forensic testing of firm systems, staff meetings and employee reviews. Katharina Stumm, CFA, Chief Compliance Officer ("CCO"), has the overall responsibility for monitoring and testing compliance with BMW's policies and procedures. Possible violations of these policies or procedures will be documented and reported by the CCO for remedial actions and/or sanctions to the appropriate supervisor, to the BMW Risk and Oversight Committee and/or to the BMW Board of Directors, depending on the repeated nature and/or seriousness of the violation in question.