

At OptiFi, we have extensive experience working with non-residents and expats willing to invest in France

We help our customers define and setup the optimum solution for their personal finances

HOW DO WE ACHIEVE THIS?

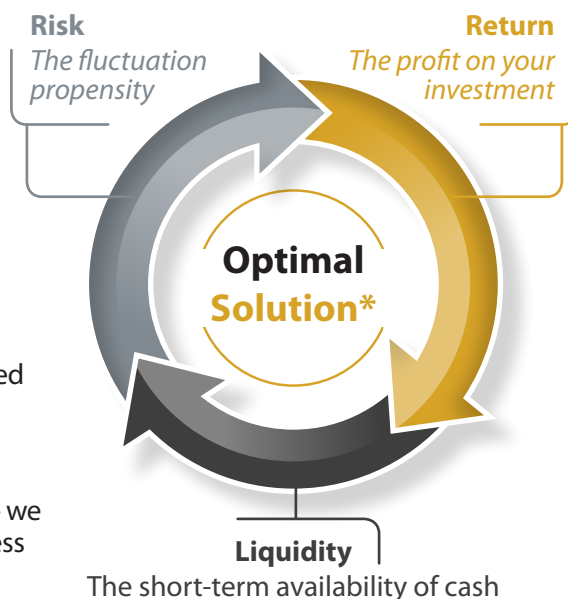
- We conduct a free audit to build a good understanding of your personal situation and goals
- We rely on financial partners and experts (e.g. law, tax, etc.) to design your optimal solution with out of the box ideas
- We take care of the admin so we spare you time and pain
- We provide support throughout the investment process and thereafter, coaching you in your personal journey

DEVELOPING THE OPTIMAL SOLUTION

The Risk - Return mix is known by many, but most forget about the lock-in period: **giving up on liquidity could increase return at low risk.**

We will guide you to define the optimal solution using all three pillars, yielding the highest return for the selected levels of risk and liquidity.

* Investment return can be enhanced through a **loan** – we can assist you in that process



« Wise advice that takes into account the financial dimension but not only... also managed to get more competitive rates than internally! Michelle, Private Banker, Monaco. »

Michelle
Private Banker, Monaco

« Good advice with great follow-up. Regardless of being a UK resident, OptiFi made the whole process easy and smooth for me. »

Marc
Investment Manager, London

We helped Marc leverage on his salary to borrow and invest in a 100% managed « Buy-to-let » real estate investment against a 20-years fixed rate loan.

OUR SERVICES AT A GLANCE

- 1 Investment advisory:** we help you define and then set the strategy that matches your personal needs
- 2 Mortgage broker:** we find for you the best financing conditions, ensuring you receive a competitive rate as well as delivering on loan insurance and deposit requirements
- 3 Tax optimisation:** we specialise in income tax, capital gains and inheritance so that we are in the best position to help reduce your tax bill

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