SQUADRA Building Family Wealth

CORPORATE PRESENTATION

Clear direction for your wealth *and investments.*

PANAMA / 2026

Regulated by Panama's SMV.
For information only.



Contents

Approach 03

Comprehensive wealth management 04

Investments 05

Portfolio management 06

Private markets 07

Equity selection Polaris Conviction 08

Wealth Planning 09

Family capital 10

Planning and succession 11

Banks and custodians 12

Wealth oversight and administration 13

Strategic direction 14

Growth, governance and execution 14

Appendix / Portfolio management mandates 15-19

Contact 20

Our approach

The whole picture. A long-term view.

Squadra is an independent family office operating in Panama since 2015, licensed as an Investment Advisor, with a heritage in Swiss private banking.

We bring together investment management, wealth planning and strategic direction for families, entrepreneurs and individuals.



MONTE SAN SALVATORE / LUGANO, SWITZERLAND

A Swiss private banking heritage

A close, trusted relationship built on transparency, professionalism and personal attention.

Technology guided by judgement

We incorporate artificial intelligence into research, monitoring and reporting. Automating routine tasks allows more time for personal relationships and decisions that call for professional judgement.

Comprehensive wealth management

Three areas. One direction.

Our view of wealth extends to people, their capabilities, values and relationships, and continuity across generations.

Investments

Portfolios and opportunities across public and private markets.

Wealth Planning

Structure, coordination and oversight

Strategic direction

Growth, governance and execution.



PALAZZO PITTI / FLORENCE, ITALY



JET D'EAU AND LAKE GENEVA / GENEVA, SWITZERLAND / AI VISUAL RECREATION

Investments

Investment ideas.
Informed decisions.

Portfolio management

We build and oversee portfolios based on objectives, risk and liquidity, coordinating transactions with banks and custodians.

Private markets

We select and monitor private investments, supported by financial, legal and operational analysis.

Equity selection

Equity analysis and selection through Polaris Conviction, our method applied to active advisory.

Portfolio management

Clear mandates. Ongoing oversight.



MANDATE FRAMEWORK

The mandate defines who decides, who executes and how the portfolio is reviewed.

Advisory

STRATEGIC + TACTICAL

A non-discretionary mandate. Squadra makes recommendations; the client decides. Regular reviews.

Discretionary management

STRATEGIC + TACTICAL

Squadra makes decisions within the agreed mandate and sends orders to the custodian, supported by investment committee reviews and reporting.

Oversight

STRATEGIC

The client and their investment manager make the decisions. Squadra provides oversight without executing transactions.

Active advisory

TACTICAL

Tactical decisions with the client’s approval and close monitoring.



DATA CENTRE / DIGITAL INFRASTRUCTURE

Private markets

Rigorous selection.
Long-term value.

We assess opportunities in private equity, private debt, hedge funds and co-investments in line with each client's risk profile, time horizon and liquidity needs.

A documented thesis

We conduct financial, legal and operational analysis, assessing the risk and governance of each investment.

Access and monitoring

We select managers and investment structures, monitor commitments and maintain close contact with management teams.



STARSHIP / AI VISUAL RECREATION

Equity selection

Polaris Conviction

Our equity analysis and selection method, applied to active advisory.

Identify ideas

Signals and catalysts that point to an investment opportunity.

Test the thesis

Assess the business, competitive advantages and risks against the evidence.

Assess valuation scenarios

Valuation scenarios and potential returns in light of the time horizon and risks.

Size the position

Portfolio weight, entry point and limits based on conviction and risk.

Review the portfolio

Reassess the thesis, valuation and risk. Adjust positions accordingly.



SQUARE AND ARCADES / LUGANO, SWITZERLAND

Wealth Planning

Structure, coordination and oversight.

We organise our clients' wealth and coordinate banks, advisors and day-to-day matters to help clients make decisions.

Planning and succession

Structures and governance to support family continuity.

Banks and custodians

Banking coordination and a consolidated view across banks.

Wealth oversight and administration

Asset administration and family logistics.



QUAI WILSON / GENEVA, SWITZERLAND

Family capital

Structuring a legacy

Family capital brings together the financial resources, capabilities, values and relationships that sustain wealth over time.

People	Wellbeing, leadership and preparing the next generation.
Judgement	Informed decision-making through learning and governance.
Relationships	Connections across business and finance.
Identity	Family values reflected in structures that support continuity.
Resources	Strategies to preserve and grow wealth.

Squadra Multi Family Office – Asesor de Inversiones, Corp. / Regulated by Panama's SMV. For information only.



FLORENCE / DUOMO THROUGH THE TREES / AI VISUAL RECREATION

Planning and succession

Continuity across generations

We coordinate wealth and succession planning with the client's legal and tax specialists.

Wealth structures

Trusts, foundations and companies. Tax and liquidity planning. Structures for gifting and philanthropy.

Legacy and governance

Wills, succession agreements and powers of attorney. Family governance agreements, education for heirs and advance directives.

Banks and custodians

Custody. Efficiency. Compliance.

We design each client's banking and custody arrangements in line with their legal, tax and wealth structures.

Selection and coordination

We assess institutions and financial centres by financial strength, jurisdiction and service quality. We coordinate account openings and banking relationships.

International network

Banks, independent custodians and specialist platforms in established financial centres.

FINANCIAL CENTRES

Geneva · Zurich · Madrid · Miami · London · Hong Kong
Lugano · Liechtenstein · Monaco · Dubai · Singapore



A SWISS PRIVATE BANKING HERITAGE

Wealth oversight and administration

More control. Less friction.

Day-to-day administration

Documentation, payments, insurance, property, art and events.

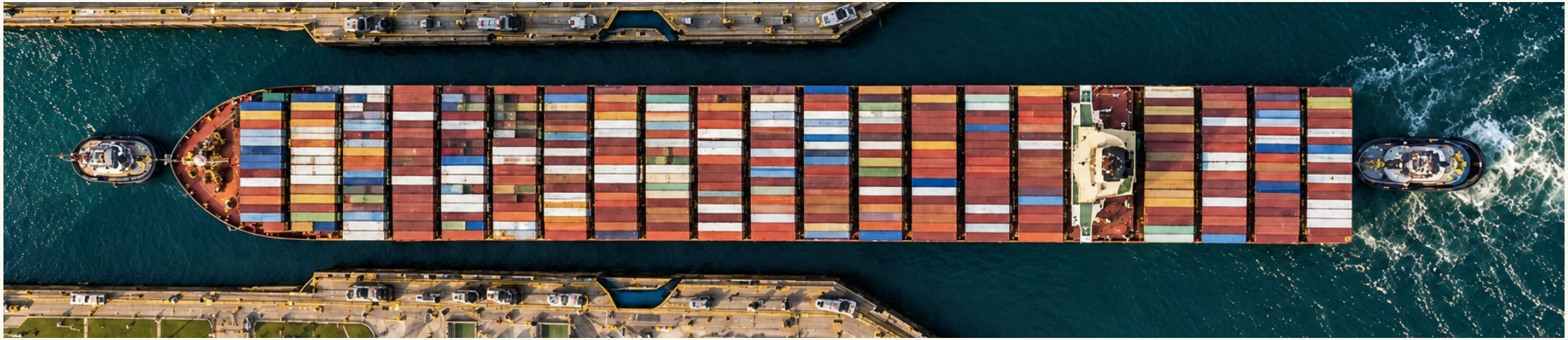
Professional coordination

Banks, tax, legal and accounting advisors, and other third parties.

Direction and follow-through

We prepare decisions, lead meetings and follow each matter through to resolution.





CANAL LOCKS / PANAMA / AI VISUAL RECREATION

Strategic direction

Growth, governance and execution.

We support business owners and partners in strategic decisions and in overseeing their businesses and projects.

We coordinate legal, tax and accounting specialists according to each client's needs.

Growth and capital

We assess business plans, funding needs and options for growth or liquidity.

Governance and oversight

We support shareholders and boards in their decisions and in overseeing management.

Special situations

We coordinate the restructuring of projects and assets, the recovery of value and the implementation of an exit strategy.

Portfolio management

Service mandates

Advisory 16

Discretionary management 17

Oversight 18

Active advisory 19

The agreed service defines the scope of the relationship, decision-making authority and review frequency.



Advisory

Non-discretionary management

Squadra recommends. The client decides.

We develop investment recommendations based on each client's risk profile, objectives and overall wealth position.

Research-based recommendations

Analysis of opportunities and appropriate allocations. Every decision requires the client's approval.

Monitoring and oversight

Regular portfolio reviews and performance reports, with a clear record of decisions.

Discretionary management

Structured delegation.
Disciplined execution.

We manage the portfolio under a mandate agreed with the client.

Mandate and limits

Investment policy, risk and liquidity limits. Allocation across traditional and alternative assets.

Decisions and order transmission

Squadra makes decisions within the mandate and sends orders to the custodian.

Accountability

Regular committee reviews, reporting and checks against the mandate.



Oversight

An independent view.
Structural oversight.

We oversee portfolios managed by third parties, assessing decisions, performance and costs against the client's objectives.

Portfolio alignment

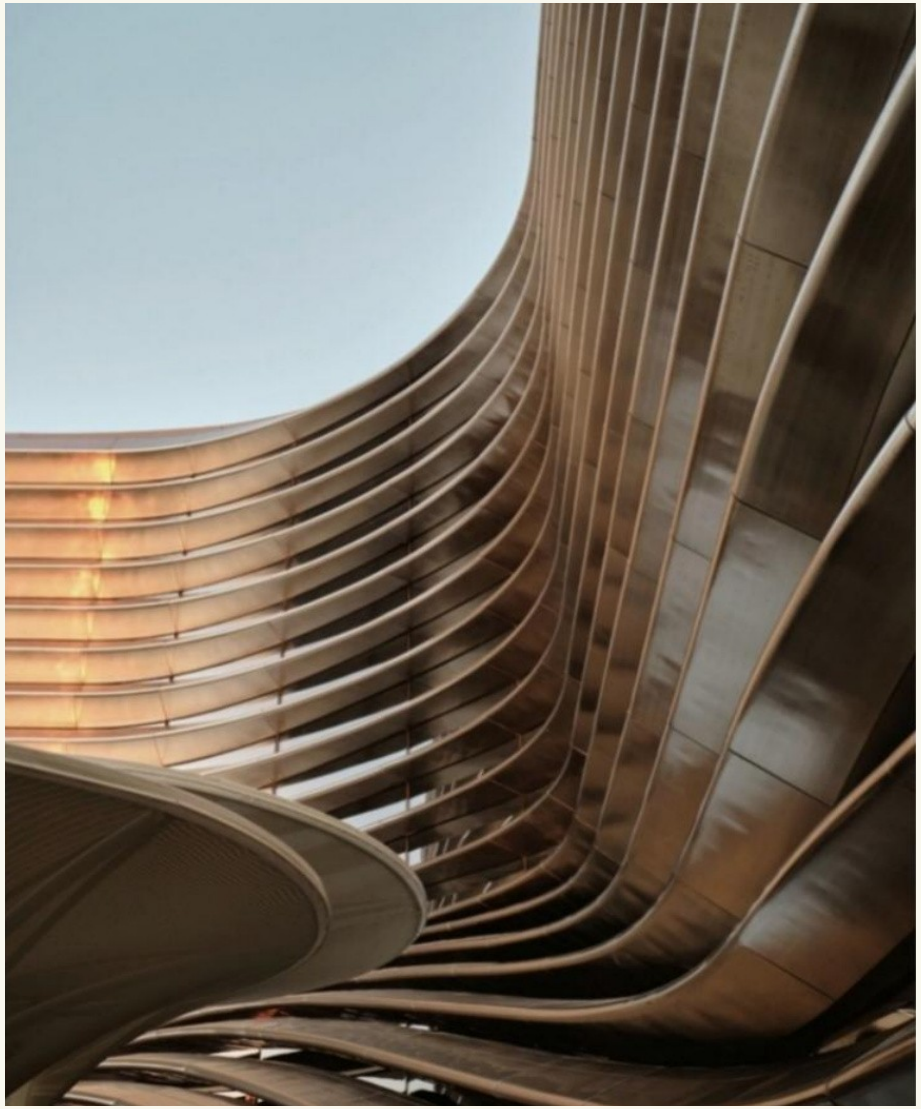
Review of risk, asset allocation and adherence to mandates.

Information to guide decisions

Regular reports on deviations and matters requiring attention.
Squadra does not execute transactions.



CORREDOR SUR / PANAMA CITY



Active advisory

Conviction and close monitoring

We apply Polaris Conviction to equity selection, with client participation and close monitoring.

Research-based recommendations

Each company's thesis, valuation and risks. Position sizes reflect conviction and the client's profile.

Frequent contact

Direct contact several times a week, according to the client's needs. Every trade requires the client's approval.

Thesis monitoring

We review results, valuation and risks, proposing position adjustments when the evidence changes.

Contact

Contact us to arrange a meeting.

Contact our team to discuss how we can help you structure, protect and grow your wealth.

TELEPHONE	+507 366 1017
EMAIL	info@squadra.fo
WEBSITE	www.squadra.fo
ADDRESS	PH Evolution Tower, Calle 50 y Ave. Aquilino de la Guardia Panama City, Republic of Panama



EVOLUTION TOWER / PANAMA / AI VISUAL RECREATION

Important information

This document is for information only and does not constitute an offer, a solicitation to invest or an individual investment recommendation. Any decision should take account of the investor's objectives, financial situation and risk tolerance.

Investments may lose value, including the capital invested. Past performance, projections and scenarios do not guarantee future results.

Polaris Conviction is the equity analysis and selection method applied to active advisory. Recommendations are tailored to each client, who approves every trade. Investing in equities involves market, concentration and liquidity risks, as well as risks specific to each company.

Building Family Wealth

Squadra Multi Family Office - Asesor de Inversiones, Corp.

Regulated and supervised by the Superintendency of the Securities Market of the Republic of Panama.
Investment Advisor licence granted under SMV Resolution No. 580-2015 of 11 September 2015.

www.squadra.fo