



# ANNE SOPHIE TOURRETTE

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A VETERAN LEADING WITH  
ASTUTE FINANCE  
STRATEGIES

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In an executive world that is largely controlled by men, women have to struggle to carve out a place for themselves. It is evident that they must put in more effort to reveal their actual managerial abilities. The founder of the independent wealth management firm **AdvisorOne**, **Anne Sophie Tourrette**, has a particular perspective on women in leadership roles. She thinks that as women's levels of education have improved, they have become much more self-assured about what they can offer.

According to Anne-Sophie, both men and women can possess the leadership skills necessary to explore, invent, and have a passion for creating and advance. However, women are perceived as being more practical and long-term focused than men, which makes them less tactical and more human. They tend to be more selfless (less self-interested), more careful, and more "knowing how to be" than "knowing how to do."

#### Journey to AdvisorOne

Anne-Sophie started her banking career in 1990, where she worked in France, the US, Luxembourg, and Switzerland. Her clientele has traditionally comprised high-net-worth individuals and corporate leaders, with a majority of women. She competed against 100 other applicants from the European financial and wealth management industries for the title of "Citywealth Platinum Advisor" in 2007. (*Just to be precise not only I competed but I was awarded*)

AdvisorOne was founded because of Anne-Sophie's choice to establish herself as an independent manager following a burnout in 2008. Anne-Sophie realized she had to leave the banking industry, since it went against her morals. She frequently refers to her

work as “wealth styling,” which describes how she approaches each client individually.

#### Assuring Finance

AdvisorOne is a Geneva-based asset management business operating under Swiss law. The business specializes in individualized wealth management and planning and is associated with a Swiss association of asset managers. AdvisorOne doesn't place any of its clients into a predetermined mold as it aspires to establish a genuine connection rather than merely a business relationship.

AdvisorOne's experts work with clients to define their needs and identify solutions that will satisfy them. The company has implemented ESG standards to carry out this (investments that consider environmental, social, and governance criteria). Given that it is unusual for women to work in wealth management in Switzerland, Anne-Sophie is pleased to have been able to commemorate the company's tenth anniversary (in 2018).

The company's most significant and unique service is geared toward women's empowerment. Hundreds of people have benefited from AdvisorOne's help in finding the ideal investment. The company customizes its services to each client's unique personal and professional circumstances and takes the time to discuss all options with them before recommending a particular investment.

#### Implementing Experience

With 32 years of banking expertise, Anne-Sophie saw a big knowledge gap among her female clients and that the industry lingo was completely foreign to them. The goal of Anne-Sophie's five-step “Chose abundance for the rest

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of your life" methodology is to empower women to successfully manage their assets with a “money mindset” by helping them understand how the financial system operates as well as their reluctance and relationship with money.

Anne-Sophie's primary function and duties are to ensure that the customer has financial security and the motivation to make a good impact investment for both the future of the planet and the welfare of future generations.

#### Challenges and Accomplishments

Anne-Sophie is a woman who enjoys being slightly hyperactive. She enjoys posing, accepting, and facing

challenges. Anne-Sophie has a lot of willpower, determination, and above all a very high degree of independence that pushes her to always find answers. She is a single mother and a business owner with disruptive and original ideas, and she is always on the go.

Being in the financial industry for 32 years and still enjoying it, in Anne-Sophie's opinion, is her greatest accomplishment. She was nonetheless named one of the 10 Inspiring Business Women Leaders of 2022 after receiving the Citywealth Platinum Advisor award in Europe in 2017. Anne-Sophie is pursuing her passion and is pleased to support these women's lives after assisting them in deciding to choose plenty for the rest of their life.

Anne-Sophie takes pride in her accomplishments, which include managing hundreds of financial portfolios, running her own business since 2008, and leading workshops for both young people and women. To support the community of 56 independent asset managers, she also founded another business in 2011 called AWAP.

#### AdvisorOne as a Society

To approach requests and deliver solutions that best fulfill customer expectations, AdvisorOne takes the time to talk with and get to know its workers and clients. Transparency is a very essential value, and the company values its relationships with customers and partners. Anne thinks of AdvisorOne as a company that assembles architects; it uses all of its abilities to construct a sturdy building and seeks partners with the same ideals as its clients. When a client accepts a transaction, the company doesn't merely hunt for a service provider who will pay it; instead, it prioritizes the

human element since it wants the client to be happy.

#### Keeping Work-Life Balance

Even though Anne-Sophie has long been a workaholic, it took her over 52 years to recognize that she needed to find a better balance between her personal and professional lives. In Anne-Sophie's opinion, learning about kundalini yoga has saved her. Even after changing careers, she continues to make one call per week. Anne-Sophie enjoys swimming and skiing and trains herself in the gym two to three times a week with a personal trainer.

#### Advice for Young Women Leaders

According to Anne-Sophie, A woman leader must be able to listen, think things through before responding, trust herself, and pay attention to her feelings. And most importantly, always respect and use common sense.

She continues, *“You have to believe in what you are doing, constantly keep your attitude positive, and create avenues that will bring you to your goals.”* Anne-Sophie ends her chat with advice for aspiring women leaders. She says, *‘Many individuals have the belief that “we have always done things this way, so I don't see why we should change,” yet the world is continually changing, so we must too! We must welcome the new technologies and the ideas of young people who have different ways of thinking and have grown up with different tools than us, rather than fighting against this change.’*

