



MAERKI BAUMANN & CO. AG

PRIVATBANK

MEDIA RELEASE

Maerki Baumann & Co. AG awarded “summa cum laude” for the 14th time by the editors of the Elite Report

Zurich, 24 November 2021 – The Zurich-based private bank Maerki Baumann & Co. AG has once again been awarded the top rating of “summa cum laude” in the German Elite Report on Asset Managers for 2022. It is the 14th year running that the bank has achieved this rating, thus securing its leading position as one of the top 51 banks in German-speaking Europe.

Maerki Baumann was able to build on its strong performance of previous years in a targeted fashion and was awarded the Report’s highest rating of “summa cum laude” for the 14th time in succession. “The award encourages us to continue to focus on the needs of our clients and the sustainable development of their assets”, said a delighted Gerald Lulei, Head of Private Banking Germany.

The Elite Report of Asset Managers examined banks and asset management specialists from Switzerland, Germany, Austria and the Principality of Liechtenstein. The assessment is based on a company survey, test purchases and a poll of selected reference clients. In performing the assessment, criteria such as client focus, advisory quality, service, value for money, product transparency, expertise and degree of individualisation were taken into account. Maerki Baumann differentiated itself primarily through its innovative modular investment solution – an individual asset management offering – as well as its advisory competence in the field of traditional and digital assets.

The expert jury of Elite Report invited guests to attend the awards ceremony in Munich on the evening of 22 November 2021. The award was accepted in person by Gerald Lulei, Head of Private Banking Germany, and Konstantinos Ntefeloudis, Head of Investment Management.

Maerki Baumann & Co. AG – Private Bank

Founded in 1932, the Zurich-based private bank Maerki Baumann & Co. AG focuses on its core competencies of investment advisory services and asset management, as well as providing services for independent asset managers. The traditional bank, which is open to modern technologies, is a family-owned company that takes a long-term view and offers its services from Switzerland only. Its investment philosophy based on independence, security and transparency is reflected in its very solid capital base and in the bank’s transparent performance. With its modular investment approach and its crypto offering, the private bank underlines its aim of combining the traditional with the new. Maerki Baumann has assets under management of around CHF 9.9 billion, of which more than 80% originate from Switzerland and about 10% from Germany.

Enquiries

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