



MAERKI BAUMANN & CO. AG

PRIVATBANK

## PRESS RELEASE

### **Maerki Baumann & Co. AG awarded the accolade of “summa cum laude” by the Elite Report editorial office for the 15th time**

**Zurich, 22 November 2022 – Zurich-based Maerki Baumann & Co. AG confirmed its top rating of the past few years and was awarded the accolade of “summa cum laude” by the Elite Report for the 15th time in succession.**

Maerki Baumann can once again count itself among the elite asset managers in German-speaking countries this year. At an awards ceremony in Salzburg, the private bank was given the honour of “summa cum laude” by the Elite Report, which is published in cooperation with the Handelsblatt newspaper, for the 15th time in succession. Konstantinos Ntefeloudis, Head of Investment Management, and Roger Arnet, Deputy Head of Private Banking Germany, accepted the award in person. Dr Stephan A. Zwahlen, CEO of Maerki Baumann & Co. AG: “The accolade confirms that we have been successful in further developing Maerki Baumann. We have gradually modernised our private bank and focussed on new client needs and changed framework conditions. While the utilisation of digital potential plays an important role here, personal contact with our clients remains key – in keeping with our motto of ‘trust has a future’.”

For its annual evaluation, the Elite Report examined banks and asset managers from Switzerland, Germany, Austria and the Principality of Liechtenstein. The test results were collected on the basis of a questionnaire, test visits and a survey of selected reference clients. The assessment incorporated the criteria of client focus, advisor quality, service, value for money, product transparency, expertise and the degree of individualisation. Maerki Baumann made a particularly convincing impression with its investment principle “security over return” as well as its outstanding advisory expertise in the area of traditional and digital assets.

#### **Maerki Baumann & Co. AG – Private Bank**

The Zurich-based private bank Maerki Baumann & Co. AG was founded in 1932. For generations, it has focused on its core competencies in the areas of investment advice and asset management as well as in serving independent asset managers. Steeped in tradition, the private bank sets itself apart as a non-listed family company. Its investment philosophy, which is geared towards independence, security and transparency, is reflected, for example, in a very solid equity base and comprehensible reporting. With its innovative modular investment approach and comprehensive crypto services, the private bank underlines its claim of combining the tried-and-tested with the new. Maerki Baumann currently manages more than CHF 9 billion in client assets, primarily from Switzerland and Germany.

#### **Enquiries**

Dr Stephan A. Zwahlen, CEO  
stephan.zwahlen@maerki-baumann.ch, +41 44 286 25 25