



MAERKI BAUMANN & CO. AG

PRIVATBANK

## MEDIA RELEASE

**Maerki Baumann & Co. AG has had its top rating confirmed by the business magazine “Bilanz” for 2023 and has once again been recognised as a longstanding quality leader.**



**Zurich, 27 April 2023 – Zurich-based Maerki Baumann & Co. AG has once again been able to confirm its position at the top of Switzerland's private banking charts in 2023 after being named the second best Swiss private bank by the business magazine “Bilanz”. This is the fifth time that the family company has achieved a top rating after taking first place in 2022, 2021 and 2017 in addition to second place in 2019. After taking a leading position once more, Maerki Baumann was again recognised as a longstanding quality leader.**

The renowned private bank rating of the business magazine “Bilanz”, which sees a real private client accompanied on their search for a suitable bank, has been conducted for a 15th time. In total, around 100 banks were invited to prepare an investment solution based on a comprehensive request. This year, the dimensions of interaction between client advisors and their clients, the provision of holistic investment solutions, transparency, costs, risk disclosure and portfolio structure were once again assessed by a jury comprising several members. Maerki Baumann came through all test phases with flying colours and won the award for second best Swiss private bank. This success underlines the high level of reliability demonstrated by the traditional Zurich-based bank, which it has been able to maintain for many years despite changing client needs and framework conditions.

Dr Stephan A. Zwahlen, Chief Executive Officer of Maerki Baumann & Co. AG, is delighted about the result: “The client-oriented corporate culture and high level of agility of Maerki Baumann are shaping the successful further development of our family company. We take new trends and investment opportunities as an opportunity to expand our offering on a continuous basis. Especially in times of heightened uncertainty, Maerki Baumann’s strengths as an owner-managed private bank, which are underpinned by a solid equity base, high liquidity reserves and professional risk management, come to the fore”. Stephen Zwahlen also views the award as a sign of the high level of consistency achieved in the bank’s service quality and as confirmation that Maerki Baumann is on the right track with the hybrid advisory that sees it combine personal work with modern digital applications – in keeping with the motto of “trust has a future”.



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### **Maerki Baumann & Co. AG**

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 that puts its faith in independence, security and transparency. This is reflected, for example, in its 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. In establishing its private equity and venture capital offering, Maerki Baumann has recently further expanded its alternative investment opportunities. The bank currently manages around CHF 9 billion in client assets, primarily from Switzerland and Germany. Further information can be found at [www.maerki-baumann.ch](http://www.maerki-baumann.ch).

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