



MAERKI BAUMANN & CO. AG

PRIVATBANK

PRESS RELEASE

Maerki Baumann & Co. AG once again awarded the accolade of “summa cum laude” by the Elite Report editorial office

Zurich, 28 November 2023 – Zurich-based Maerki Baumann & Co. AG was awarded the accolade of “summa cum laude” by the Elite Report for the 16th time.

Maerki Baumann can once again count itself among the elite asset managers in German-speaking countries this year. At an awards ceremony, 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 16th time in succession. Roger Arnet, Head of Private Banking Germany, and Konstantinos Ntefeloudis, Head of Investment Management, accepted the award in person in Salzburg. Dr Stephan A. Zwahlen, CEO of Maerki Baumann & Co. AG: “A client-oriented corporate culture and a high level of agility shape the development of our private bank and its efforts in the area of innovation. Our clients quite rightly place their trust in our reliability for the holistic management of their assets”.

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 philosophy of “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 that puts its faith in independence, security and transparency. 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 also further expanded private market investments as alternative investment opportunities. The bank currently manages approximately CHF 9 billion in client assets, primarily from Switzerland and Germany.

Enquiries

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