



MAERKI BAUMANN & CO. AG

PRIVATBANK

MEDIA RELEASE

Maerki Baumann & Co. AG offers an integrated total solution for both traditional and digital assets with immediate effect

Zurich, 1 March 2021 – The implementation of Maerki Baumann’s crypto strategy is entering the next phase: In addition to a comprehensive corporate offering for blockchain and crypto companies as well as the trading and custody of digital assets, the bank’s spectrum of innovative crypto services is now being rounded off by investment advice in connection with this asset class. Thus, the independent Swiss private bank headquartered in Zurich now offers an integrated total solution for both traditional and digital assets. In this way it is strengthening the synergies between traditional private banking and the new crypto world.

Although digital assets were still an experimental asset class followed by a small number of technology enthusiasts just a few years ago, they are now on their way to becoming a fixed element in the world of professional investment advice, wealth and asset management. For this reason, the private bank has expanded its existing crypto offering to include investment advice on digital assets. Maerki Baumann is thus one of the first Swiss private banks to address the growing need for crypto advice, completing its spectrum of services in this area after having introduced reliable trading and secure custody of digital assets in mid-2020.

Dr Stephan A. Zwahlen, Chief Executive Officer: “Our client advisors are often asked whether cryptocurrencies are the future, and whether these assets might add an element of balance to a client portfolio. We are also receiving an increasing number of enquiries about the right way of accessing this new asset class. Thanks to the proven expertise of our investment specialists and partners, we can now enable our clients to reach their own informed opinions on the use of digital assets.”

Investment advice based on FinSA and MiFID

The new services on the investment advisory side include direct investments in common cryptocurrencies and tokens, as well as the corresponding forms of collective investment. These services are integrated into Maerki Baumann’s proven advisory process, which takes into account all relevant provisions of Switzerland’s Federal Financial Services Act (FinSA) and the European Union’s Markets in Financial Instruments Directive (MiFID). Clearly defined processes are used to ensure that digital assets – with the significant market volatility that they have exhibited to date – are the right fit for a client, bearing in mind his or her individual risk profile.



Information and knowledge transfer

The proven specialists at Maerki Baumann can call on long-standing expertise when providing personal investment advice and responding to questions on the issues of blockchain and digital assets. Clients can therefore obtain a clear in-depth insight into this emerging asset class, which in turn will allow them to make investment decisions more easily. “From our conversations with clients we can sense that the dynamic world of cryptocurrencies still represents a challenge to many. We therefore see it as our task to remove this uncertainty with brief, tailored training sessions and personal discussions so that the opportunities and risks of this new asset class can be properly addressed”, explains Stephan Zwahlen.

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 an unlisted 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 8.5 billion, of which more than 80% originated in Switzerland and about 10% in Germany.

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