



MAERKI BAUMANN & CO. AG

PRIVATBANK

MEDIA RELEASE

Maerki Baumann & Co. AG has been named the best Swiss private bank by the business magazine “Bilanz” for a second time in a row and has also been recognised as a longstanding quality leader.



Zurich, 29 April 2022 – Zurich-based Maerki Baumann & Co. AG has once more been able to confirm its position at the top of Switzerland’s private banking charts in 2022 after again being named the best Swiss private bank by the business magazine “Bilanz”. This is the fourth year in which Maerki Baumann won after taking top spot in 2021 and 2017 in addition to second place in 2019. Due to receiving the award once more, Maerki Baumann has also been declared 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 14th 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 best Swiss private bank in the final. 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, CEO, is delighted that the bank has been honoured with the awards once more and believes that this recognition reflects the high degree of consistency in its service provision while also serving as confirmation that Maerki Baumann is on the right track with its hybrid advisory approach, which combines the personal work of his colleagues with modern digital applications such as the e-banking solution and mobile banking app. Remo Wissmann, the responsible Senior Client Advisor, is also convinced that this is the case: “As a family business, Maerki Baumann possesses great institutional stability, consistently focuses on client needs and demonstrates a high degree of individuality in its service provision.” Konstantinos Ntefeloudis, Head of Investment Management, confirms the importance of the bank’s independence in its investment process: “Our innovative modular investment solution provides an excellent platform for the implementation of our “defensive growth” investment approach for the benefit of our clients.”



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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 10 billion in client assets, primarily from Switzerland and Germany. Further information can be found at www.maerki-baumann.ch.

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