



MAERKI BAUMANN & CO. AG

PRIVATBANK

Journal



Employee portrait -

From Swiss wrestling pants to a silk tie

Interview -

From Swiss wrestling to the world of private banking

Focus module “Private Equity”

With the “Private Equity” focus module, Maerki Baumann, working in cooperation with Partners Group, one of the world’s leading managers of private market investments, offers its qualifying clients access to the asset class of unlisted equity securities.



Learn more about the Focus module “Private Equity” at Maerki Baumann.

Dear Reader

Sport provides excellent training for life and this is especially true in the case of Swiss wrestling. The fighting spirit and fairness demonstrated by Swiss wrestlers on the sawdust are both impressive and formative at the same time. It therefore comes as little surprise that Swiss wrestling enjoys enormous popularity across all generations. We at Maerki Baumann also feel very attached to the sport’s values, including its down-to-earth attitude and sense of tradition, which are embodied by the wrestlers themselves. It therefore gives us great pleasure to be able to introduce Eugen Hasler to you from page 3: The former elite Swiss wrestler has carved out a second career at our bank.

Retirement provision is one of the issues that concern the people of Switzerland most. How can I ensure financial security so that I can enjoy my retirement without any worries? These are questions we often hear from our clients. The earlier you get the ball rolling with the most important measures, the higher the quality of life you will enjoy later on. Maerki Baumann offers comprehensive advisory services in the area of pension and retirement planning. Find out more about our services from page 6.

I wish you an inspiring read.

Best regards

Dr Stephan A. Zwahlen
CEO Maerki Baumann & Co. AG



From Swiss wrestling pants to a silk tie

Eugen Hasler is one of the most successful Swiss wrestlers in history. After bringing down the curtain on his sporting career, he joined the private bank Maerki Baumann.



“Schränz Geni” was a daredevil: He won more than 100 wreaths during his professionally planned Swiss wrestling career. Any setbacks he suffered only further fuelled his sense of ambition.

It was a make or break contest that was ultimately decided with a final round that allowed an entire region to breathe a sigh of relief. For the first time since 1986 and for only the second time ever, a native of Central Switzerland became Swiss wrestling champion. In the stands in Pratteln, guest of honour Eugen Hasler, also from Central

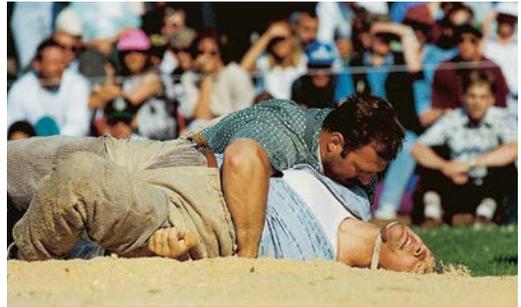
Switzerland, cheered on Joel Wicki’s victory: “What a spectacle. I have rarely seen such a battle of attrition in a final round,” he said following the conclusion of the Swiss Wrestling and Alpine Festival at the end of August 2022.

Eugen Hasler, now 57 years of age, has been watching 25-year-old Joel Wicki for some time. He still has crystal clear memories of their first encounter: “The first thing I noticed were his extremely strong forearms,” says Hasler, who until a few years ago had held a central role within the Central Swiss Wrestling Association. While Wicki is rather small for a Swiss wrestler at 1.83 metres, Hasler is the benchmark at 1.90 metres.

With his versatile Swiss wrestling repertoire, he also set sporting standards during the 1980s and 1990s. Eugen Hasler came out on top at 38 wreath festivals, winning a total of 101 wreaths. Every time he stepped on to the sawdust, action was the order of the day: With his aggressive style, he earned himself the nickname “Schränz Geni,” which has stuck with him to this day. If a youngster asks him for advice, he says to remember that “as soon as you step on to the sawdust, you are the boss.”

With this motto, he succeeded in becoming a celebrated Swiss wrestler who was at the pinnacle of his sport at a young age without much training. This was until he suffered a setback in 1986 at the Swiss Wrestling and Alpine Festival: Contrary to all expectations, he failed to win a wreath. “At this point I realised I had to make a choice: either stop or continue and really push on.” His ambition was awakened – Hasler began to work with the latest training methods, honing his muscles and technique for 20 hours a week during both the summer and winter. In order to finance his family’s living costs, he always worked full-time as well. His job as an animal feed consultant in the field service at least gave him a certain degree of flexibility that allowed him to combine his sporting activities and career.

He won almost everything, with only one elite title missing from his palmarès: Despite twice being the heavy favourite in the final round of the Swiss Wrestling and Alpine Festival, he missed out on the crown on both occasions, with controversial referees’ decision also playing their part. “It wasn’t meant to be,” he says laconically, emphasising his competitive side in the process: “While the defeats were bitter, they motivated me to work even harder.” He values his triumph at the Kilchberger Schwinget Swiss wrestling festival in 1990 as his most prized victory.



He shares with us that he took the cash value of the bulls awarded to him whenever he came out on top. His other trophies, namely wreaths, bells, tables and chests, are displayed in a room at his home in Galgenen in the canton of Schwyz.

Unlike today, the top Swiss wrestlers at that time did not become rich. This is because advertising and sponsorship were forbidden. When Eugen Hasler once took the liberty of posing in the “Blick” newspaper with the logo of his equipment supplier, he was immediately threatened with a ban by the association. “Otherwise, I could have opened an account

with Maerki Baumann,” he says with a laugh.

The two did eventually strike up a relationship after all. In 1999, Eugen Hasler ended his career as an active sportsman after a chronic illness made it difficult for him to compete at the top level. Through a personal contact, he applied for a job at Maerki Baumann and today, as Head of Services, he and his team take care of the private bank’s infrastructure, building maintenance, security, post and archives (see page 5).

While Eugen Hasler now only makes his way onto the sawdust for demonstration purposes, he is still one of the driving forces on the Swiss wrestling scene. For the next Swiss Wrestling and Alpine Festival, which is set to take place in 2025 in Mollis in the canton of Glarus, he is a member of the organising committee and responsible for the sporting department. He started this work in this role immediately after the festival in Pratteln in August of this year.

“Defeats motivated me to work even harder.”

Eugen Hasler

“If you want, you can learn anything.”

Eugen Hasler talks about his switch from Swiss wrestling to the world of private banking, his sense of ambition and listening to his body.

Mr Hasler, how did you come to work at the private bank Maerki Baumann?

The job came about through a personal contact more than 20 years ago. They were looking for somebody to work 50 percent on the Cash Desk and 50 percent in the Technical Service. I was open to a new challenge, as my employer at that time had gone bankrupt.

Swiss wrestling and the banking sector are two completely different worlds. How did you experience this change? It goes without saying that they are different worlds, but I have always believed that if you want, you can learn anything. I had already completed business school as well as financial courses and had a great interest in the industry.

What memories do you have of your early days in the banking industry? I'll never forget how it began: Due to the absences of my colleagues, I had to work alone at our private bank's Cash Desk for three weeks right after I joined. While I was thrown in at the deep end, it also gave me the chance to learn a lot quickly.

As a Swiss wrestler, you were already known for your strong sense of ambition.

It is important to me to do my work as well and as quickly as possible. The position provided me with career opportunities that I wanted to take advantage of. I gradually took on more responsibility and temporarily headed both the Cash Desk and Services departments.

What skills from the world of Swiss wrestling have you been able to draw on for your work at the bank?

I am determined, adopt a forward-looking approach and work in a precise manner. I am also ready and willing to embrace change. From my Swiss wrestling days, however, I am also aware that you should listen to what your body is saying to you.

What do you mean? As an active athlete, I would build up a great deal of muscle during the winter with strength training. When the spring arrived, however, I would find that this had been at the expense of my mobility. I analysed the situation I was faced with and drew the right conclusions: With a few kilos of muscle less, I was livelier in my movements and enjoyed more success.

What does this mean in terms of your work at the bank? A few years ago, I reached a point where I realised that assuming responsibility for two departments was too much for me. I have experienced blows of fate both within my family and among friends, and for more than two decades I have at times also had to live with problems associated with a chronic illness. At some stage, I lost the ability to turn off.

How did you resolve the situation? I really enjoy my work, but it cannot be at the expense of my health. When the strain became too great, I sought a discussion with my line managers and handed over responsibility for the Cash Desk. I am now fully focussed on the Services department and have slightly less responsibility. Whether at work or as a sportsman – it is important to manage your energy and not to overexert yourself however motivated you are.

Eugen Hasler
Head of Services at
Maerki Baumann
& Co. AG



Setting out your path to a comfortable retirement

It is challenging to get the wheels in motion when it comes to ensuring your future retirement provision. We support you in doing so with our expertise, meaning that you can approach the third stage of your life without any worries and enjoy your golden years.



Pension provision

When retirement approaches, it can arouse mixed feelings. Many people are enthusiastic about the new stage in their life, looking forward to being able to dedicate more time to their friends, hobbies and travel. However, it can also be a time of worry, with soon-to-be retirees faced with concerns about whether they will have enough money to maintain their accustomed standard of living or treat themselves to one or two extras.

If you want to enjoy your retirement to the full, it is a good idea to start thinking about it at an early stage. After all, retirement goes hand in hand with a fundamental change to your financial situation, as you will no longer receive salary payments from gainful employment. To ensure you can enjoy the third stage of your life without any worries, you need to develop new sources of income.

In most cases, the benefits you receive from old-age and survivor's insurance (AHV) and pension funds will not be enough to cover your expenditure. Demographic changes and low interest rates mean that pension funds have had to reduce their conversion rates and thus their benefits. This makes it all the more important to build up private financial reserves that you can draw on in old age. Every day counts: Those who regularly put aside part of their income at a young age will have enough money during their retirement years. And if you make use of a 3a account, you can save on taxes in the process.

Nobody likes to deal with old age. Nevertheless, around ten years before reaching regular retirement age, the time has come to assess where you currently stand and analyse your pension situation. Around five years before your retirement, you will be confronted with a key question: Do I want to draw my pension fund assets as an annuity, a lump-sum payment or a mix of the two?

Making a (partial) lump-sum withdrawal should be well thought out, as such a decision cannot be reversed once the funds have been paid out. In terms of tax, the different variants make a big difference.

To be on the safe side when planning your retirement, it is advisable to consult a specialist. Take advantage of our expertise in the area of pension and financial planning. Together with you, we

will tailor your retirement precisely to your needs, meaning you can embark on the third stage of your life with peace of mind.

Our services at a glance

In addition to classic investment advisory and asset management services, the private bank Maerki Baumann also offers comprehensive advice in the areas of pension and retirement planning. We are on hand to assist you and offer you support in implementing your personal goals and wishes for your retirement. Take advantage of our services:

- Analysis and planning of insurance and pension assets
- Regular review of your pension situation
- Creation of a long-term asset plan adapted in line with your needs
- Drawing up of an individual pension plan with a budget for your income and expenditure as well as your asset requirements
- Support with long-term asset accumulation and establishment of a third pillar
- Comprehensive advice on old-age and survivor's insurance (AHV), pension funds, taxes, real estate, insurance and mortgages
- In cooperation with lawyers and fiduciaries: estate planning and advisory service on tax, matrimonial and inheritance law
- Mortgage strategy and real estate financing after retirement
- Broad in-house expertise supplemented by an external network of specialists

Take advantage of our expertise. Contact us for all questions relating to financial planning and pension provision.

Nils Ganz
Head of Mortgages and
Retirement Planning,
Member of Senior Management



Find out more about
Retirement planning at Maerki Baumann.



Schweizer Tafel Soup Day – Maerki Baumann is committed

On 24 November 2022
at Zurich's Paradeplatz



“Differentiated and needs-oriented financial advice for women is indispensable. My female clients know about my in-depth understanding of their needs.”

Nicole Trachsel
Senior Client Advisor
Maerki Baumann & Co. AG



“Openness and flexibility with regard to your needs and those of your clients are very important to us.”

Yara Lavanga
Advisor External Asset Managers
Maerki Baumann & Co. AG

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concerning the suitability of such investments, since their tax treatment depends on the personal circumstances of the investor in question and is subject to change at any time.

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