



MAERKI BAUMANN & CO. AG

PRIVATBANK

PRESS RELEASE

Maerki Baumann to pass on responsibility for its German business

Zurich, 9 December 2022 – The Swiss private bank Maerki Baumann & Co. AG has put succession arrangements in place for its German business. Roger Arnet, who comes from within the bank, will take over his role as the new Head of Private Banking Germany on 1 January 2023.

The private bank Maerki Baumann & Co. AG is to place responsibility for the German market in new but familiar hands. Roger Arnet (47) has worked at Maerki Baumann since 2018 as a Member of Senior Management and during the past two years has already served as Deputy Head of Private Banking Germany. He possesses more than 25 years of experience in the German business at Swiss banks, including at DZ Privatbank (Schweiz) AG and Union Bancaire Privée SA in Zurich. Roger Arnet will take over as Head of Private Banking Germany on 1 January 2023 from Gerald Lulei, who will step back from the operational business in Germany at the turn of the year as planned. He will, however, remain with us as Head of Lawyers & Fiduciaries.

Dr Stephan A. Zwahlen, CEO of Maerki Baumann & Co. AG: “The German market has always been the most important foreign market for Maerki Baumann. As a proven private banking expert, Roger Arnet not only has outstanding knowledge of the German business, but is also an established member of our team, ensuring continuity in the support we provide to our German clients. Our thanks go to Gerald Lulei, who over recent years has succeeded together with his team in laying very good foundations for the further development of the German market.”

Maerki Baumann & Co. AG – Private Bank

The Zurich-based private bank Maerki Baumann & Co. AG was founded in 1932. It is owned by the Zurich-based Syz family and for generations 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 9 billion in client assets, primarily from Switzerland and Germany. It serves clients from across Germany, with a focus on the Hamburg, Rhineland and Rhine-Main-Neckar regions as well as the greater Stuttgart and Munich areas.

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