



MAERKI BAUMANN & CO. AG

PRIVATBANK

PRESS RELEASE

Maerki Baumann comes out on top in the 2024 private banking rating of the business magazine “Bilanz”: overall winner and best Swiss private bank



Zurich, 26 April 2024 – The Zurich-based private bank Maerki Baumann & Co. AG has reason to celebrate: it took the coveted top spot in the “Private Banks” category of the high-profile private banking rating and was also named overall winner across all rating categories with approximately 100 participating banks. This is the first time that the family company has received the accolade of overall winner. The private bank’s success is underpinned by close client relationships, proven investment and advisory processes and a highly dedicated team. Maerki Baumann was already recognised as Switzerland’s best private bank in 2017, 2021 and 2022 and also finished runner-up in 2019 and 2023.

The high-profile 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 16th 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 (or the commissioned financial advisor), the provision of holistic investment solutions, transparency, costs, risk disclosure, portfolio structure and the consideration of sustainability aspects (ESG criteria) were once again assessed by a jury comprising several members. Maerki Baumann came through all test phases with flying colours and was named the “overall winner”, meaning it was honoured as Switzerland’s best bank in the private banking rating. The additional accolade of being hailed a “longstanding quality leader” underlines the high level of reliability and consistency demonstrated by the traditional bank in the area of client support, recognising its success in adapting to changing client needs and framework conditions over many years.

Dr Stephan A. Zwahlen, CEO of Maerki Baumann & Co. AG, is delighted about the result: “The client-oriented corporate culture and high level of agility of Maerki Baumann are shaping the long-term further development of our family company. We take new trends and investment opportunities as an opportunity to supplement our offering on a continuous basis. Five years ago, for example, we already moved to integrate digital assets and crypto investments into our range of services. We also take the needs of many clients in the area of sustainability seriously by creating transparency with respect to ESG criteria in performing our investment activities”. By combining its personal advisory approach with the bank’s expertise in exploiting digital potential, Maerki Baumann is remaining true to its motto of “trust has a future”.



MAERKI BAUMANN & CO. AG

PRIVATBANK

Maerki Baumann & Co. AG

The Zurich-based private bank Maerki Baumann & Co. AG was founded in 1932. It focuses 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. The private bank stands out from the crowd thanks to its innovative modular investment solution, comprehensive crypto services and proactive handling of the topic of sustainability. Maerki Baumann currently manages almost CHF 10 billion in client assets, primarily from Switzerland and Germany. Further information on the private banking offering can be found at www.maerki-baumann.ch/en, while details of Maerki Baumann's crypto services are available at <http://www.archip.ch/en>.

Enquiries

Dr Stephan A. Zwahlen

Chief Executive Officer

+41 44 286 25 25

stephan.zwahlen@maerki-baumann.ch