



MAERKI BAUMANN & CO. AG

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MEDIA RELEASE

Swiss private bank Maerki Baumann & Co. AG expands business activity in Germany

Zurich, 25 February 2021 – The Swiss private bank Maerki Baumann & Co. AG is strengthening its positioning in the German market. The family-owned company based in Zurich has already acted as a wealth manager for clients in Germany for many decades, and is now expanding its business activities in this key foreign market in a targeted way.

Heading up the team responsible for the German market is Gerald Lulei (61), a native German who has previously held a number of different management positions for banks in both Switzerland and Germany over a period of many years. Under his leadership, an especially built-up team of existing and new client advisors looks after both private and institutional clients domiciled in Germany. The bank is now in a position to proactively drive forward the expansion of its business activity with German clients. Maerki Baumann has already taken the necessary legal and regulatory steps for this undertaking.

The bank will concentrate its marketing efforts first on the wider Hamburg region, the Rhineland, the Rhein-Main-Neckar region and the greater Stuttgart and Munich areas. Dr Stephan A. Zwahlen, Chief Executive Officer, commented as follows: “As Europe’s largest economy, Germany is a very interesting market for our private bank. And here too, an increasing number of people are looking for alternatives to the large banks with their anonymous ownership structures. This need is tangible to us, and I look forward to achieving even greater proximity to our German clients with our new team.”

Maerki Baumann is an independent private bank owned by the Zurich-based Syz family. It offers its clients in Germany more than just traditional advisory services: With its modular investment solution, it also possesses an innovative wealth management offering that allows clients to create their own individual points of focus – such as sustainable investments or Swiss equities.

The private bank sets great store by entrepreneurial independence, security in the asset management business, and a consistent future orientation. For example, in its domestic market of Switzerland, Maerki Baumann has been able to trade cryptocurrencies and hold these in custody for its clients for quite some time now. Dr Stephan A. Zwahlen: “Our motto in wealth management is ‘security before return’. This also presupposes a systematic investment process and disciplined risk management – particularly at times of heightened uncertainty. In the same way, we seek to



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develop timely, appropriate offerings for our clients in connection with key future themes, such as in the area of digital assets.”

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

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