

New Association for larger wealth managers

Given the rapid pace of technological and regulatory developments, a constant exchange of experience and know-how is critical to business success. Against this background, fourteen leading Swiss wealth managers have established the 'Alliance of Swiss Wealth Managers' (ASWM).

The new Alliance offers its members a platform to identify, discuss and deal with current developments on diverse topics such as regulation, new financial products or infrastructure solutions. The ASWM does not consider itself to be a political force. Rather, it will focus on the exchange of know-how among its members.

A challenging environment

The Swiss financial centre is still experiencing significant change, a situation which engages even larger asset managers. Felix Brem, CEO of Reuss Private and President of the ASWM explains: *"New technologies, for examples Robo Advice and Blockchain, as well as current regulatory projects such as FIDLEG, FINIG or MIFID2 pose special challenges for larger wealth managers but also offer exciting opportunities. Under these circumstances we decided to create a common platform where the specific requirements of larger wealth managers could be addressed."*

The ASWM will organize joint meetings, events and seminars in order to enable the employees of its members to benefit from best practices and the expertise of both internal as well as external experts. The aim is the creation of thematic and cross-company networks where members can discuss challenges and share solutions.

A broad Swiss membership

The ASWM would like to be representative of the larger Swiss wealth managers in their entirety. Vice President Amaury Jordan of Avalor Investment comments: *"With our fourteen members we already cover a large part of Switzerland. Of course, we want to expand our network further and to increase the influence and effectiveness of the ASWM. To this end we are open to new members who want to participate actively in this project. "*

Members of the ASWM

- Aquila & Co. AG,
- Avalor Investment AG
- Burgauer Huser Aman & Partner AG
- Entrepreneur Partners
- Finaport AG
- Forum Finance Group SA
- Helvetic Trust
- Marcuard Heritage AG
- OLZ
- Reuss Private AG
- Sound Capital AG
- swisspartners Investment Network AG
- Tareno AG
- Weibel Hess & Partner AG

For more information about the "Alliance of Swiss Wealth Managers" see www.asv-aswm.ch.

For questions and information:

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