

Zugerberg Finanz

Wealth generation with vision

Whoever relies on us knows clearly: We invest all our knowledge, passion and experience in your assets – and actively, independently and responsibly look after your capital with a focus on income generating assets. Day in, day out, personally and always in your interest.

Welcome!



Timo Dainese
CEO, Founder and
Managing Partner



Prof. Dr. Maurice Pedernana
Chief Economist and
Managing Partner

„Zugerberg Finanz is truly independent.
We guarantee best advice and wealth
management free of conflicts of interest.“

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Chief Economist and Managing Partner

Key Characteristics

- Scientific approach and use of Artificial Intelligence
- Best in class selection
- No conflicts of interest
- Swiss (franc) home bias
- Management and employees invest in the same way

Facts and figures

Employees	69
Founded	2000
AUM	4.4 billion CHF
Clients	Retail clients, private clients, foundations, family offices, pension funds and insurance companies
Memberships	Alliance of Swiss Wealth Managers (ASWM) Swiss Management Association (SMA) Zug Chamber of Commerce
Supervisory Authority	Swiss Financial Market Supervisory Authority FINMA
Awards	BILANZ Best Asset Manager in Switzerland 2023, 2020, 2019, 2018 (1 st place) 2022, 2021 (3 rd place) ZWEI Wealth Rating “highly recommended” August 2023 Morningstar 5 stars for 10 years 2015–2024 Citywire Top 50 Asset Manager 2023, 2022, 2021, 2020, 2019

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Albert Angehrn
Livio Dainese
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