

## 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.“

Prof. Dr. Maurice Pedernana  
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             | 84  |
| Founded               | 2000  |
| AUM                   | 5 billion CHF   |
| Clients               | Retail clients, private clients, foundations, family offices, pension funds and insurance companies   |
| Memberships           | Alliance of Swiss Wealth Managers (ASWM)<br>Swiss Management Association (SMA)<br>Zug Chamber of Commerce   |
| Supervisory Authority | Swiss Financial Market<br>Supervisory Authority FINMA   |
| Awards                | <b>BILANZ</b><br>Best Asset Manager<br>in Switzerland<br>2023, 2020, 2019, 2018 (1 <sup>st</sup> place)<br>2024, 2022, 2021 (3 <sup>rd</sup> place)<br><br><b>ZWEI Wealth</b><br>Rating “highly recommended”<br>August 2023<br><br><b>Morningstar</b><br>5 stars for 10 years 2016–2025<br><br><b>Citywire</b><br>Top 50 Asset Manager<br>2024, 2023, 2022, 2021, 2020,<br>2019 |

#### Board of Directors

Barend Fruithof  
Albert Angehrn  
Livio Dainese  
Karl Huwyler  
Aline Wey Speirs

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Rolf Bertschi  
Patrick Bucher  
Alexander Ineichen  
Dr. Stephan Kloess  
Urs Scholl  
Sybille Wyss

#### Contact

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