

Passion of the bank to view our clients in the centre of everything we do

“Change and progress have always been key elements of Julius Baer’s history, yet certain things have always prevailed: above all, the passion of the bank to view our clients in the centre of everything we do. Be a part of our history and performance.”



Dr Thomas R Meier

Member of Executive Board and Chief Executive Officer for Asia, Middle East and Eastern Europe, Bank Julius Baer

The way to success

Julius Baer is the leading Swiss private banking group, Dr Meier says. It is, in his words, “big enough to matter and small enough to care”.

Over four generations, the name Julius Baer has represented the highest standards of quality and expertise in the field of relationship management, asset management and investment consultancy for private clients.

An exclusive and prestigious Swiss private bank with its beginnings dating back to 1890, it has become a global wealth manager present in all major financial centres around the globe. It focuses on providing individuals and their families with tailor-made investment advice and fully diversified wealth management solutions.

It is the No 1 publicly listed pure private banking group in Switzerland with 40 locations in 20 countries and total client assets of 234 billion Swiss francs, of which assets under management stood at 150 billion Swiss francs as of end-October 2009.

“Success boils down to having the right people to serve and react to clients well,” Dr Meier says.

This is why one of Julius Baer’s strategic priorities is the continual hiring of private banking professionals along the entire value chain from the experienced, client

An eye on Asia

Asia is where wealth is generated and where the growth is happening. Although it was really not on the map of Julius Baer five years ago before it went for the acquisition of the private banks of UBS, it had made a strategic decision to allocate substantial resources to developing footprint in this growth area.

“Today we could already achieve a substantial position within the bank in terms of asset under management for Asian clients,” says Dr Thomas R Meier, Member of Executive Board and Chief Executive Officer for Asia, Middle East and Eastern Europe, Bank Julius Baer.

“In 4 years we could also commit Asia as Julius Baer’s second home market. With this, not only could we develop a significant Asian client base, we could also provide our European clients access to investment solutions and products with Asian content.”

Julius Baer has more than 10 per cent of its staff or more than 350 personnel located in Asia, where assets under management are enjoying a high growth rate. Singapore has become the bank’s second most important pillar after the Zurich headquarters and the group has pledged its commitment to building up a key regional hub here for marketing in South-east Asia, and as a product platform and back-office for Asia.

It is also leveraging on Hong Kong as its North Asia marketing hub and pending relevant authority’s approval, hopes to receive branch status there in 2010.

facing relationship managers to product experts and execution specialists.

It also selectively expands its offerings domestically and out of Switzerland to key markets in Europe, even as it builds its “second home” in fast-growing markets in Asia.

While banks are looking to dispose of non-core assets to free up capital and replenish balance sheet post-financial crisis, Julius Baer is well positioned to be a consolidator, given its strong and liquid balance sheet and track record for successful integration.

It is ready to consider acquisition opportunities in Switzerland and abroad as evidenced by the recent acquisition of ING Bank (Switzerland).

Julius Baer has also set ambitious targets for 2012. It hopes to achieve 4 to 6 per cent growth for its assets under management, and Asia will contribute substantially to this number.

Dr Meier says: “To me, the most gratifying and satisfying part of banking is always when a client says ‘thank you’ for what you have done and for the performance you have achieved for them.”

Major Milestones

- 2009 Julius Baer Group Ltd and GAM Holding Ltd shares listed separately on SIX Swiss Exchange
- 2007 “Wholesale Banking License” granted to Bank Julius Baer, Singapore Branch
- 2005 Acquisition of Ehinger & Armand von Ernst, Ferrier Lullin, Banco di Lugano and GAM Holding AG. Julius Baer becomes Switzerland’s largest pure-play wealth manager
- 2000 Julius Baer included in Swiss Market Index (SMI)
- 1980 Julius Baer first Swiss private bank to go public
- 1947 Foundation of BDL Banco di Lugano, Lugano
- 1901 Julius Baer member of the Zurich Stock Exchange
- 1890 Foundation of Bank Julius Baer, Zurich
- 1875 Foundation of Bank Falck, Lucerne
- 1812 Foundation of Armand von Ernst, Berne
- 1810 Foundation of Bank Ehinger, Basle
- 1795 Foundation of Ferrier Lullin, Geneva

Management team

- Member of Executive Board and CEO Asia, Middle East and Eastern Europe, CEO Singapore, Thomas R Meier
- Deputy CEO Singapore and Head Investment Finance, David Lim
- Head Private Banking South East Asia, Wilfried Kofmehl
- Chief Operating Officer, Markus Kobler
- Head Products and Investment Solutions Group Asia-Pacific, Kenny Ho
- Head Markets Asia-Pacific, Gerard Berclaz
- Chief Investment Officer Bank Julius Baer, V. Anantha-Nageswaran
- Co-head Investment Solutions Group Singapore, Lee Boon Keng

Accolades in 2009

- “Best Boutique Bank in Asia/Pacific 2008 and 2009” from Asiamoney
- “Best Private Bank 2008 and 2009” from FinanceAsia
- “Best Wealth Manager 2010” in German-speaking Europe from Fuchsbriefer publishers.
- “Best Strategy for Growth Award 2009” from the Financial Times Group
- “Outstanding Private Bank – Customer Relationship Skills” in 19th Private Banker International Awards 2009
- “Best Corporate Governance 2009” and “Best Private Bank” from BILANZ



BANK JULIUS BAER & CO. LTD.

One George Street, #21-02,
Singapore 049145

Tel: +65 6827 1999

Fax: +65 6827 1995

www.juliusbaer.com

Julius Bär