

# SPONSORING OPPORTUNITIES 2026 / 2027



# SWITZERLAND'S LEADING WEALTH PLATFORM

FIVE DISTINCT STRATEGIC ADVANTAGES FOR OUR SELECTED SPONSORS:



Premium **brand positioning** through close association with one of Switzerland's most respected and high-profile wealth management platforms.



**Direct access** to senior decision-makers, including Board Members, C-Level executives and Managing Directors across private banks and independent wealth managers.

**TOP  
200**

Highly **curated audience** environment at one of Switzerland's most traditional venues, with participation strictly limited to 200 of the most senior industry leaders, by invitation only.



Extended **reach and visibility** through CFA Society Switzerland's live event coverage, engaging over 4,000 Swiss-based members.



Sustained **thought-leadership presence**, including ongoing visibility in our industry newsletters, logo placement, and the opportunity to contribute proprietary insights.



The Swiss Wealth Management Summit is a **high-profile**, well-established **flagship event** aimed at **Board Members, C-Level** and **Managing Directors** of leading Swiss and Liechtenstein private banks. We honour the winning banks with our prestigious awards in five categories for large and small private banks.

This platform brings together the **most relevant decision-makers** in the financial ecosystem and offers unique strategic exchange, high-level networking and open dialogue.

**Audience:**

- Most senior Swiss and Liechtenstein private bankers (Board of Directors, C-Level, Managing Directors)
- Number of seats limited to 200, by invitation only

**Event Language:** English / German  
**Study Language:** English  
**Partners:** Tier-1 Swiss media companies

**PROGRAM**

Time	Topic	Presenter
17:00 – 17:30	Arrival and Check-in	
17:30 – 17:40	Welcome	Chris Künzle
17:40 – 17:55	Keynote Interview <b>CEO</b> , Platinum Sponsor	Claude Baumann
18:00 – 18:15	Presentation of Study Results	Chris Künzle
18:15 – 19:15	Panel Discussions: <b>C-Level</b> of Winning Banks <b>C-Level</b> of Platinum & Gold Sponsors	Claude Baumann
19:15 – 21:00	Apéro Riche and Networking	



## Independent Wealth Manager Summit 2027

Wednesday, 10 March 2027, 5:00 p.m.

Zunftthaus zur Meisen, Zurich

The Independent Wealth Manager Summit is an exclusive and **unique forum** for **owners** and **decision-makers** of the over 1,300 FINMA-licensed independent wealth managers in Switzerland.

We present the results of the second edition of our acclaimed, **nationwide scientific study** – with unique, data-based insights and benchmarks for the industry.

**Audience:**

- Swiss independent wealth managers (Owners, Partners, Managing Directors)
- Number of seats limited to 200, by invitation only

**Event Language:** German

**Study Language:** German, French, Italian, English

**Partners:** Tier-1 Swiss media companies

### PROGRAM

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17:00 – 17:30	Arrival and Check-in	
17:30 – 17:40	Welcome	Chris Künzle
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18:00 – 18:15	Presentation of Study Results	Chris Künzle
18:15 – 19:15	Panel Discussions: <b>Owners</b> of Independent Wealth Managers <b>C-Level</b> of Platinum & Gold Sponsors	Claude Baumann
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# AWARD WINNING STUDIES

“THIS STUDY IS A TROVE OF INSIGHTFUL INFORMATION ON BOTH LONG-STANDING AND EMERGING ISSUES AROUND SWITZERLAND’S INVESTMENT-ADVISORY BUSINESS. TAKEN TOGETHER, IT HELPS EXPLAIN WHY SWISS BANKS REMAIN THE WORLD’S LARGEST WEALTH MANAGERS.”

Prof. Dr. Martin Janssen,  
Chairman, **Ecofin Group**

“THIS IS QUITE A COMPREHENSIVE IN-DEPTH STUDY TAKING CRITERIA SUCH AS SOLID CAPITALISATION INTO ACCOUNT.”

Christian Katz, Board Member,  
**Dreyfus Sons**

“I WOULD LIKE TO THANK YOU FOR THE OUTSTANDING AND IMPORTANT WORK ON THE WEALTH MANAGEMENT STUDY. YOU HAVE CREATED A HIGHLY VALUABLE REFERENCE AND BENCHMARKING TOOL FOR STAKEHOLDERS.”

Simon Wyss, CEO, **Privatbank von Graffenried**



“THIS STUDY SHOULD BE UNDERSTOOD AS A VALUABLE AND TIMELY SNAPSHOT OF THE CURRENT STATE OF THE SECTOR.”

Prof. Dr. Maurice R.H. Pedernana,  
Professor of Banking and Finance,  
**HSLU University of Applied Sciences and Arts Lucerne**

“THE STUDY OFFERS NUANCED AND WELL-FOUNDED INSIGHTS INTO CURRENT MARKET DEVELOPMENTS AND COMES HIGHLY RECOMMENDED.”

Patrick Stauber, CEO, **Marcuard Heritage**

“IT WAS A PRIVILEGE TO CONTRIBUTE TO THIS IMPORTANT RESEARCH AND TO SHARE INSIGHTS ALONGSIDE INDUSTRY LEADERS AND INNOVATORS.”

Alain Gallati, Market Head German-Speaking Switzerland, **Pictet Asset Services**



**The Ultimate Benchmark** – The most authoritative, data-driven studies on wealth management in Switzerland and Liechtenstein



Over 25,000 **PDF downloads**



Over 1,000,000 **LinkedIn impressions**



# WEALTH MANAGEMENT SUMMIT

(6 NOVEMBER 2025, ZUNFTHAUS ZUR MEISEN, ZURICH)



## 145 SENIOR PARTICIPANTS

- 30 Members of Boards of Directors
- 51 C-Level (e.g., CEO, CFO, COO)
- 31 Managing Directors
- 33 Other (e.g., Executive Directors, External Asset Managers)



# INDEPENDENT WEALTH MANAGER SUMMIT

(18 MARCH 2026, ZUNFTHAUS ZUR MEISEN, ZURICH)



### 155 SENIOR PARTICIPANTS

73 Owners of FINMA-licensed Independent Wealth Managers

31 Senior Managers of FINMA-licensed Independent Wealth Managers

51 Invited Guests (e.g., Boards of Directors, C-Level, Managing Directors)



# ECOSYSTEM

## MEDIA COVERAGE



## SPONSORSHIP ROSTER



## COMPETENCE PARTNERS



## MEMBERSHIPS



## PHILANTHROPY



# SPONSORING OPPORTUNITIES

Become part of **Switzerland's leading wealth platform**: as a sponsor, you position your brand at the heart of the ecosystem of Swiss and Liechtenstein private banks and independent wealth managers – directly with decision-makers, entrepreneurs and senior opinion leaders in the industry.

Sponsorship Package	Silver	Gold	Platinum
<b>Flagship Study</b>			
Sponsor logo on cover page	✓	✓	"Presented by"
Sponsor profile in the study (with contact person)	✓	✓	✓
<b>Before the Conference</b>			
Sponsor logo on WealthSummit website	✓	✓	"Presented by"
Sponsor mentioned in LinkedIn posts	✓	✓	"Presented by"
Sponsor logo on personal invitations	✓	✓	"Presented by"
Conference tickets – for sponsor	2 tickets	2 tickets	2 tickets
Conference tickets – for clients, guests, sponsor		4 tickets	8 tickets
<b>During the Conference</b>			
Advertising booth at the venue	Standard	Premium	Premium
Roll-up banner at the venue	1 banner	2 banners	3 banners
Sponsor logo in conference presentation	✓	✓	"Presented by"
Managing Director in panel discussion		✓	✓
Keynote interview with CEO			✓
<b>After the Conference</b>			
Sponsor logo on personal "thank you" mailing	✓	✓	"Presented by"
Sponsor mentioned in LinkedIn posts	✓	✓	"Presented by"
<b>Media Coverage (by FIN21 AG)</b>			
Sponsor mentioned in personal LinkedIn posts by Chairman and CEO of WealthSummit	Firm	Firm & representative	Firm & representative
Free blog article on WealthSummit website		1 article	3 articles
Video interview with CEO (published on WealthSummit website and LinkedIn)			✓
<b>Media Coverage (by Tier-1 Media Partners)</b>			
Exklusive live-streaming by CFA Society Switzerland (4,000 members)	✓	✓	✓
Extensive media coverage	✓	✓	✓
<b>Prices (CHF, excluding VAT)</b>			
<b>Private Banks</b> – Wealth Management Summit (29 October 2026) – 100 Most Influential Private Bankers (July 2026)	15,000.–	25,000.–	65,000.–
<b>Independent Wealth Managers</b> – Independent Wealth Manager Summit (10 March 2027)	10,000.–	20,000.–	50,000.–
<b>Combo:</b> – All platforms	<i>upon request</i>	<i>upon request</i>	<i>upon request</i>

# CONTACTS



**Christoph Künzle**

Founder and CEO

FIN21 AG

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Chris Künzle is a renowned lecturer, award-winning author, and thought leader in the fields of wealth management and international finance. Born and raised in Zurich, he combines strong local roots with a global network shaped by decades of leadership experience in Swiss and international institutions.

He is the Founder and CEO of FIN21 AG, Switzerland's leading wealth management platform, which brings together senior industry leaders for strategic dialogue.

A graduate of the University of St. Gallen (HSG) in Business Administration, a Doctor of Law, and a CFA charterholder, he combines academic excellence with many years of industry expertise.



**Claude Baumann**

Chairman

FIN21 AG

[claude.baumann@fin21.ch](mailto:claude.baumann@fin21.ch)



Claude Baumann is Chairman of the Board of Directors of the Swiss research company FIN21 AG, which specializes in studies on the financial sector.

Previously, he was the founder and publisher of the financial news platform finews in Zurich and Singapore. During his studies in commerce and business administration in Zurich, he co-founded the literary publishing house Nagel & Kimche.

He later worked as a journalist for various media outlets and founded the business travel magazine ARRIVALS. He has authored several books on the banking industry, most recently a widely acclaimed biography of the Swiss banker Robert Holzach.

## **IMPRESSUM**

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