
Press Release

Zurich, 30 January 2022

Rothschild & Co expands wealth management pension offering and strengthens team in Zurich

Rothschild & Co will enter into a strategic partnership with pension consulting firm, PensExpert AG. Dr Thomas Bamert will join Rothschild & Co in Zurich as Head of Wealth and Pension Planning, Switzerland

Rothschild & Co is delighted to announce that its Swiss Wealth Management business will become one of a small number of carefully chosen firms to partner with pension consulting firm PensExpert AG. PensExpert provides pension solutions tailored to the wealth management and private banking industry. Rothschild & Co will primarily contribute its investment and wealth planning expertise.

At the same time, Dr Thomas Bamert will join Rothschild & Co as Head of Wealth and Pension Planning, Switzerland, responsible for implementing the partnership and expanding the firm's range of pension solutions.

There is increasing demand for pensions solutions in Switzerland, providing growth potential for the Wealth Management business in this area. Through this strategic partnership, Rothschild & Co will meet increasing demand for pensions advice from its clients and offer even more comprehensive advice.

Andreas Feller, Head of Swiss Onshore Zurich at Rothschild & Co's Wealth Management business, said: *"The Swiss pension market has demonstrated sustained growth for many years. Thanks to the partnership with PensExpert, we will position ourselves more effectively in this growth area and advise our clients even more comprehensively. Our investment approach, which is based on a long-term perspective, is an excellent match for the pension needs of high-net-worth individuals. We are delighted to welcome experienced pensions expert, Thomas Bamert, to Rothschild & Co to support us as we further expand the footprint of the Swiss onshore business through pensions."*

Thomas Bamert will join on 1 February 2023. Most recently, he worked for Bank Julius Baer & Co. as a Wealth Planning Adviser, where he further developed the firm's pension services. Prior to that, Bamert held various positions at Swiss Life. In addition to holding a doctorate in economics from the University of Zurich, Bamert completed an MAS in Financial Consulting (ZHAW) and a DAS in Pension Fund Management (HSL).

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About Rothschild & Co, Wealth and Asset Management

Rothschild & Co is family-controlled and independent and has been at the centre of the world's financial markets for over 200 years. With a team of c.3 800 talented financial services specialists on the ground in over 40 countries, Rothschild & Co's integrated global network of trusted professionals provide in-depth market intelligence and effective long-term solutions for our clients in Global Advisory, Wealth & Asset Management, and Merchant Banking.

Wealth Management offers its clients an objective long-term perspective on investing, structuring and safeguarding assets, to help them preserve and grow their wealth. Asset Management offers innovative investment solutions in a variety of asset classes, designed around the needs of each and every client. We serve a diverse client base from our European offices in France (Paris, Marseille, Lyon, Bordeaux, Toulouse, Aix-en-Provence), United Kingdom and Channel Islands (London, Guernsey, Manchester, Birmingham, Leeds), Switzerland (Zurich, Geneva), Germany (Frankfurt, Düsseldorf), Belgium (Brussels), Italy (Milan), Spain (Madrid), Luxembourg and Monaco as well as from our US office in New York. Wealth and Asset Management assets total some €100 billion.