

[View in the browser](#)



Lapis Press Release

ZWEI Wealth Conference 2023

Article from finews.com: "Speed Dating for Wealth Managers"

For Italian Version see [PDF](#)

The financial industry is exploring new ways to bring providers and customers together. In Zurich this week, a «beauty contest» was held to see who was the most desirable at the end.

To describe an independent investment strategy in seven minutes is no child's play, but in today's investment environment, it's a skill demanded of asset managers and banks. This was recently on display at this week's inaugural Wealth Office Conference hosted by Zwei Wealth in Zurich.



Founded in 2014, Zurich-based Zwei Wealth is active in wealth management consulting, using a digital platform matching investment offers from selected banks and independent asset managers with potentially interested parties. By optimizing supply and demand, the company says it achieves significant improvements in returns and cost savings for clients.

Hundreds of Firms Competing

To live up to its quality standards, Zwei Wealth reviews the offerings of some 500 financial institutions according to several criteria, including track record, costs, and offering quality. A provider rating is a recent addition.

Other factors considered are the providers history, assets under management, number of employees, specialization, ownership structure, and possessing necessary licenses. Two-thirds of the providers managing around 6.2 billion Swiss francs meet the criteria.

120 Guest Judges

To escape the virtual world, Zwei Wealth launched the inaugural conference this year, CEO Patrick Mueller told finews.com. At this week's event in Zurich, around 120 guests rated the performance of 21 independent wealth managers and banks on a scale of one to five on their cell phones following a seven-minute presentation.



Offerings ranged from relatively mundane fixed-income strategies, appealing in the current interest rate environment, to sophisticated scientific investment concepts and digital impact investments.

Customer Inquiries

With such presentations, the industry is breaking new ground and illustrating what clients demand most today: transparency, independence, and cost awareness, all at the touch of a button is possible. These demands are contained in a new report from Zwei Wealth measuring and analyzing customer satisfaction, returns, risks, and costs.

The platform and the presentation in a speed-dating format, if you will, in front of a large audience is a new and unconventional way for providers to attract potential clients, the representative of a Swiss private bank told finews.com. In the past few days alone, he received around 20 customer inquiries worth a total of 20 million francs stemming from the event.

The Best Providers



While the organizers announced the top three providers, Zwei Wealth kept the remaining ratings to themselves. In third place was independent asset manager Héreens Quality Asset Management (HQAM) with a 20-year track record of investing in companies based on fundamentals.

Three providers shared the **second step** of the podium. Private bank LGT for its investment portfolio and J. Safra Sarasin for its dividend strategy in recessionary times. The other was Ticino-based asset manager **Lapis Asset Management**, which presented a strategy for investing mainly in large dividend-paying companies.

Crowdlending Platform as the Winner

The clear winner of the contest was Swisspeers with a score of 3.9 in the voting rating (maximum score 5). This is an independent crowdlending platform that allows companies to raise debt capital from investors directly – i.e. without the intermediary of a financial institution. This peer-to-peer financing aims to create a simple and transparent alternative to traditional bank loans.

The information provided in this document constitutes marketing material.

The document has been prepared for information purposes only and does not constitute an offer, investment recommendation, personal advice or solicitation to purchase financial instruments and does not offer or promote any form of investment. This document does not constitute

investment advice on financial instruments and therefore the information made available in this document should not be construed as a recommendation or invitation to invest.

The presentation has been prepared with the utmost care and attention; however, errors cannot be excluded. LAPIS Asset Management SA excludes any liability that may result from incorrect or outdated information.

The information, estimates and projections contained in this document are necessarily based on current market conditions, which may change significantly in the short term. Therefore, changes and events occurring after the date of the document could affect the validity of the conclusions contained in the document. LAPIS Asset Management SA assumes no obligation to update and/or revise the document or the information and data on which it is based.

For further information in relations to financial instruments reported in the present document/mail please refer to the official product documentation.

LAPIS Asset Management
Via Emilio Bossi 6 | CH-6900 Lugano | Switzerland
tel +41 91 971 16 93 | mail info@lapis.finance



This email was sent to zulu@lapis.co.za
You received this email because you are registered with LAPIS Asset Management Ltd

[Unsubscribe here](#)



© 2023 LAPIS Asset Management Ltd