



**ULRICH VOLLMER**  
Your Wealth

Zollikon

Our company has been in talks over the past few years regarding potential co-operations or even M&As, and still is. The trick is to find the right balance between meeting regulatory requirements and making sensible business decisions

on issues such as expansion, recruitment and succession planning, which makes it difficult.

For small and medium-sized entities like us, it is important that in addition to the business needs, above all, the personal touch must fit. The challenge is to find the right people that fit the company and have the necessary know-how and spirit to be accepted by our clients. The requirements are different than in bigger entities. Individuality, flexibility, personality and integrity are the main drivers of our business.

Our idea is to play an active role, have a straightforward strategy and be open-minded. Our aim is not to be bought up, but to develop and grow our own business on a sustainable basis.

The impression we have and our own experiences indicate that decision making processes in the independent asset management business in Switzerland tend to be quite stiff and determined by a 'wait and see' strategy, both on regulatory requirements and succession planning.

Banks are probably benefiting from that, especially if the older independent managers are going out of business without a solution for their clients.