

Beautiful Wealth Solutions In A Complex And Fast-Changing World

Founded in 1958 and based in Lugano, PKB Private Bank SA (PKB) is an independent private banking boutique with offices in Zurich and Geneva. PKB offers wealth solutions to private clients, entrepreneurs, institutional clients and external asset managers.

The bank is part of PKB Group, which manages CHF 12bn of assets (of which PKB Private Bank CHF ~6.5bn) and employs more than 200 client-oriented specialists located in Switzerland, Italy and Latin America.

What was the winning formula of your firm that explains why you won?

Our values, as well as the strong entrepreneurial culture embedded in the bank's history, distinguish us from our competitors. Dedication, professionalism and attention to the customer are in the DNA of the management and the shareholder family.

Drawing on decades of experience in private banking, our clients rely on PKB throughout their entire lives, allowing us to build long-lasting relationships that create value and impact.

Where do you see the wealth management industry and your part of it going in the next five years?

The last few years have been characterised by a high degree of economic and geo-political instability with significant impacts on financial markets. Faced with global anxieties and tensions, clients are closely observing the economic situation, seeking answers from qualified professionals. In particular, according to our experience the complexities of the current environment result into an increasing need for asset protection, stability and efficiency.

This trend will likely persist in the forthcoming years: therefore, we believe that the ability to cope with such complexity will be the true added value for private banks.

Furthermore, the disruptive technologies in the age of AI, the environmental challenges and the new priorities of the Next Gen are reshaping our world: in order to remain competitive, we need to decipher the major changes that are taking place.

What are you going to do to remain competitive and stay ahead?

Operating within this fast-changing environment is not easy but is pushing us to give even more importance to our "tailor-made" approach, which for us consists of a distinguished strength in listening and anticipating our clients' needs.

We take time to understand in order to be able to deliver effective and flexible wealth solutions. We intend to keep reducing the complexity for our clients, conveying trust and confidence within a challenging geo-political and economic framework.

How do you hope your firm will benefit from getting this award?

We are proud to represent excellence in Lugano, the third largest financial center in Switzerland. This award is a further recognition of our efforts to develop ourselves while maintaining a strong local presence: being rooted in the territory is indeed one of PKB's core values.

Our rootedness is reflected not only in the decision to be headquartered in Lugano, but also in the numerous initiatives that PKB launched to support local business and innovation with the goal to fuel a virtuous circle in the local economy.



Luca Venturini
CEO
PKB Private Bank SA



Winner

• Lugano-Based Private Bank