

# FORUM

FINANCE

people trust people



## The Forum Finance Group SA

Discretionary wealth management  
Active advisory services  
Wealth planning  
Estate planning  
Family Office services  
Multi-bank consolidation services  
Swiss pension planning

Authorised and regulated as an asset manager by FINMA in Switzerland and registered in the USA as an investment advisor with the SEC.



**WINNER**

*Assets Over CHF 1 Billion AUM  
Next Generation Program*

**The Forum Finance Group SA**

FIND OUT HOW WE CAN HELP YOU ON: [www.forum.finance](http://www.forum.finance)

# Our Collaborative Culture Makes All The Difference



**Egon Vorfeld**  
Managing Partner  
**The Forum Finance Group SA**



We are delighted to be the recipient of two *WealthBriefing* accolades for 2026. Forum Finance has evolved over the last 3 decades to become one of the leading EAMs in the Swiss market. With assets under management close to CHF2bn and 26 employees we rank among the top 3% of actors in the Swiss market.

## How do you cultivate a culture that consistently drives excellence and high performance?

We have been servicing a global clientele for more than 30 years and experienced very different market cycles, significant regulatory changes and a forever stronger Swiss Franc. Despite or perhaps because of these challenges we have continued to grow our business. We believe that our collaborative culture is the reason for that success.

Excellence and high performance are a natural outcome of teamwork.

We have done so by engendering a highly collaborative and equitable culture at Forum Finance – something so very different from a cost-sharing or platform model. This however requires a generous spirit among our partners and employees, where everyone is incentivised and keen for the company as a whole to do well. The effects of this collaborative culture are very much felt by our clients and provides much better outcomes for everyone.

We rarely discuss costs or cost-sharing – we mostly talk about investing in the business. This may well be the reason Forum Finance was one of very few Swiss EAMs that voluntarily sought out direct FINMA regulatory oversight 10 years before it became compul-

sory and similarly decided to register as investment advisor with the SEC to service U.S. clients. These actions were only possible because of our long-term collaborative mindset.

## What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

The geopolitical and macro environment has become less predictable and the costs of running our businesses are forever increasing – including the strengthening Swiss Franc.

The Swiss independent wealth management industry will continue to grow as the need for high quality and totally independent service only increases. Clients seek their advisors' personal touch and long-term dedication. The recent regulatory changes have however made it very difficult for the smaller EAMs to survive, so we expect the number of Swiss EAMs to drop substantially in the years to come. We believe that we are in the sweet spot: big enough to weather the increasing regulatory demands but small enough to offer the personal service expected by clients.

## How do you identify and develop future leaders within your organisation?

We have always had a strong focus on the Next Generation at Forum Finance, both internally and externally. We have a number of younger Equity Partners in our business who participate in our monthly Partnership meetings where we discuss strategic plans and provide full transparency. Their voices really count as they are the future. When their time comes to lead – they are fully prepared to take on the management responsibilities of the company.