



PRESS RELEASE

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BERGOS IMPLEMENTS A NEW TOOL TO DELIVER INVESTMENT ADVICE AND ENHANCE CLIENT SERVICE

The independent Swiss Private Bank Bergos is pleased to announce the addition of the Evooq Wealth Platform to its software suite. The new tool, developed by one of the leading providers of wealth management technology solutions, will enable the Zurich-based Private Bank to optimize individual investment proposals in line with client preferences based on the bank's in-house opinion. The efficient tool for customized investment strategies will enable relationship managers to provide their clients with highly individualized and personalized investment solutions.

The launch of the Evooq Wealth Platform is the latest milestone in Bergos' digitalization strategy. Following the successful launch of the new core banking system, the second phase focuses on significant improvements to the client experience with a focus on investment advice and private banking. The joint goal of Zurich Private Bank Bergos and software provider Evooq is to drive innovation and offer an outstanding client experience in private banking.

“As a bank that is committed to “Human Private Banking”, we want to empower people - this applies equally to our clients and our advisors. In order to achieve this, we need and want to harness the potential of state-of-the-art digital solutions. With the Evooq Wealth Platform, we are delighted to have implemented a tool that provides our advisors with an optimal basis for supporting clients with highly personalized investment proposals.” says Dr. Peter Raskin, CEO and Partner at Bergos.

The system-supported generation of investment proposals, that take full account of the individual preferences and risk parameters of each client, will now form the optimized basis for targeted and personalized client advice. The introduction of the Evooq Wealth platform makes the bank's combined expertise even more accessible for our clients. This comprehensive and intelligent tool enables our client advisors to provide their clients with even more personalized and efficient advice.

“We’re very pleased that Bergos chose our solution to empower their Client Advisors and enhance the overall wealth management and advisory capabilities and client experience. We look forward to continuing this journey together, elevating the standards of private banking and investment advisory in Switzerland and abroad.” says Cédric Ullmo, CEO of Evooq.

The launch of these new features is the latest step in Bergos' digitalization journey. The platform comprises SaaS-based core banking and wealth management technology, infrastructure and operational services. It enables the delivery of customized banking services to be offered while streamlining internal processes and improving overall efficiency.



BERGOS AG

Bergos AG is an independent Swiss Private Bank focusing on private wealth management. Bergos emerged in 2021 with a new shareholder base from its former mother company, the Berenberg Group founded in 1590, and has been serving international private clients and entrepreneurs in the Swiss financial center for over thirty years. Its headquarters are in Zurich with an office in Geneva. The Swiss Private Bank is dedicated to "Human Private Banking" and specializes in wealth management and advisory services. With more than 130 employees, the focus is on providing expert guidance in all known liquid asset classes, as well as in private markets and alternative investments. Following a "beyond money" approach, we also offer expertise in art collecting and philanthropy. For entrepreneurial clients, Bergos offers access to M&A and other corporate finance services. Bergos AG offers private clients, entrepreneurs and their families a holistic, cross-generational service that focuses on security, neutrality, internationality and openness to the world.

EVOOQ

Evoq is a Swiss-based provider of wealth management technology solutions with the mission to offer personalized investment advice at scale. Its comprehensive solutions cover the entire process - from customer profiling to generating investment proposals - automating even the most complex and labor-intensive tasks. Through its sister company, Edgelab, Evoq integrates the best-in-class risk analytics and portfolio construction capabilities into its platforms to empower investment professionals with vital information at their fingertips. It significantly reduces the number of tools wealth managers need to perform their jobs, freeing up time to focus on what is essential for them—building and strengthening client relationships.

Evoq is trusted by some of the world's largest banks and wealth management companies across Europe and Asia.

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