

# Evolutionary Data Management in Private Banking

Gregor Bienz, CEO

Zurich, February 25, 2010



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# Solid Roots for a Sound Future



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# Solid Footholds for a Sound Future

## Partnership

We aim to offer services that set standards in the Private Banking industry. Our clients can count on a network that has grown over decades. We strive to offer the best solutions and reach our goals together with existing and new partners – not just now, but in the long run.

## Vision

We believe in long-term perspectives – because anyone who decides to invest money invests in his individual vision of tomorrow and seizes his chance to actively shape his future. A future-oriented approach in the best interest of our clients has therefore been part of our investment philosophy since our foundation.

## Pioneering spirit

Around 70 years ago, Hugo A. Frey sowed the first seeds with exemplary formations of companies ranging from Niederer Kraft & Frey to Interhold. Following and expanding on this tradition, the foundation of Bank Frey by Markus A. Frey was a logical consequence. The unfaltering pioneering spirit of the Frey family and the decade-long experience complement each other very nicely.

## Ambition

We neither rest on our laurels nor pursue any unrealistic goals. Our client's success is our biggest reward. It may be due to this attitude that we can look back on continuous, solid growth even amid market disruptions.



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# Solid Roots for a Sound Future

## Swissness

Truly Swiss, truly private. A financial institution without any branches abroad, Bank Frey is independent of all discussions on banking secrecy and globalization and continues to live the true values of Swiss Private Banking: Confidence, competence, individualism, safety, reliability, integrity and discretion.

## Compliance

With Hugo A. Frey and Markus A. Frey, renowned lawyers have shaped the core of this bank. To us, compliance is not a quest for the grey areas and loopholes, but an all-embracing, efficient co-operation with our clients within and in detailed knowledge of the applicable legal framework and the current regulation.

## Time

Time is the most relevant aspect in building wealth. Are you ready to plan for the long run? If so, you will see that we are the right partner for you. A partner whose maxim embodies the long-term aspect of wealth planning and is always happy to take time to talk to you.



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# Marketing and Innovation



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# Marketing and Innovation

A business has two, and only two, basic functions:

Innovation

+

Marketing

“ Marketing and Innovation produce results;

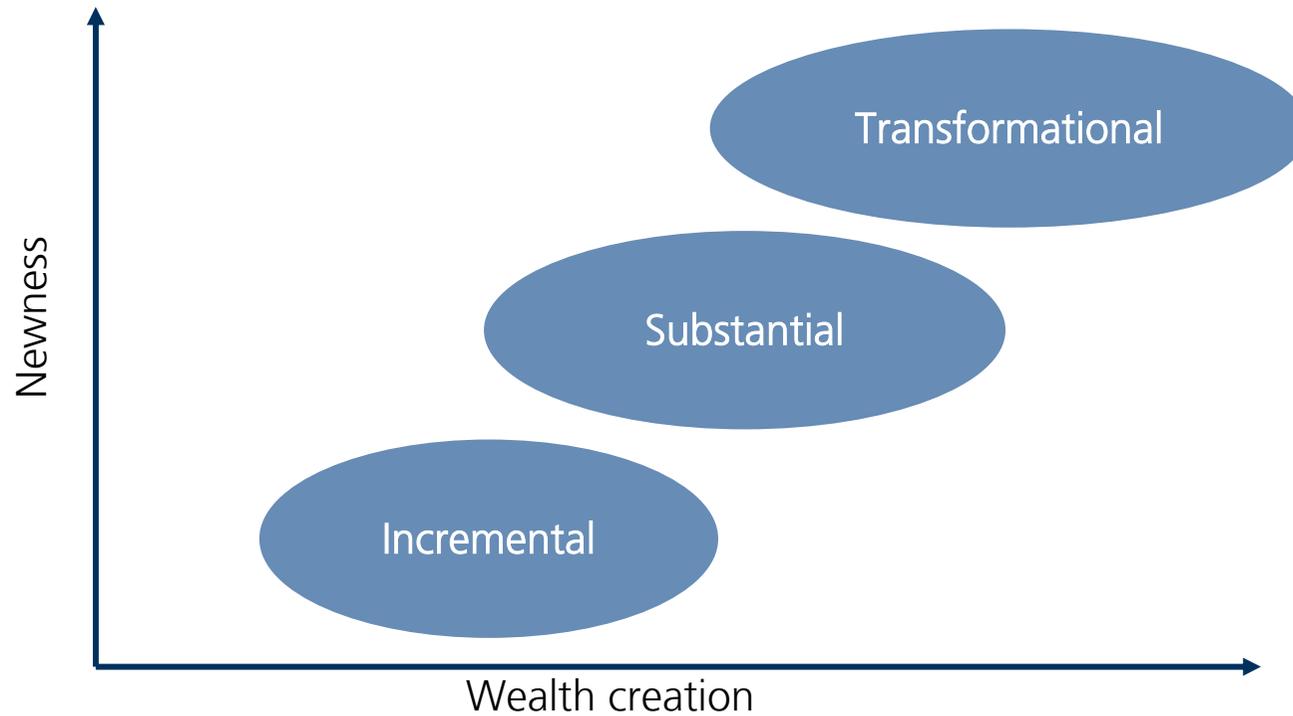
all the rest are costs.”

Peter F. Drucker, Harvard Business School



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# Types of Innovation

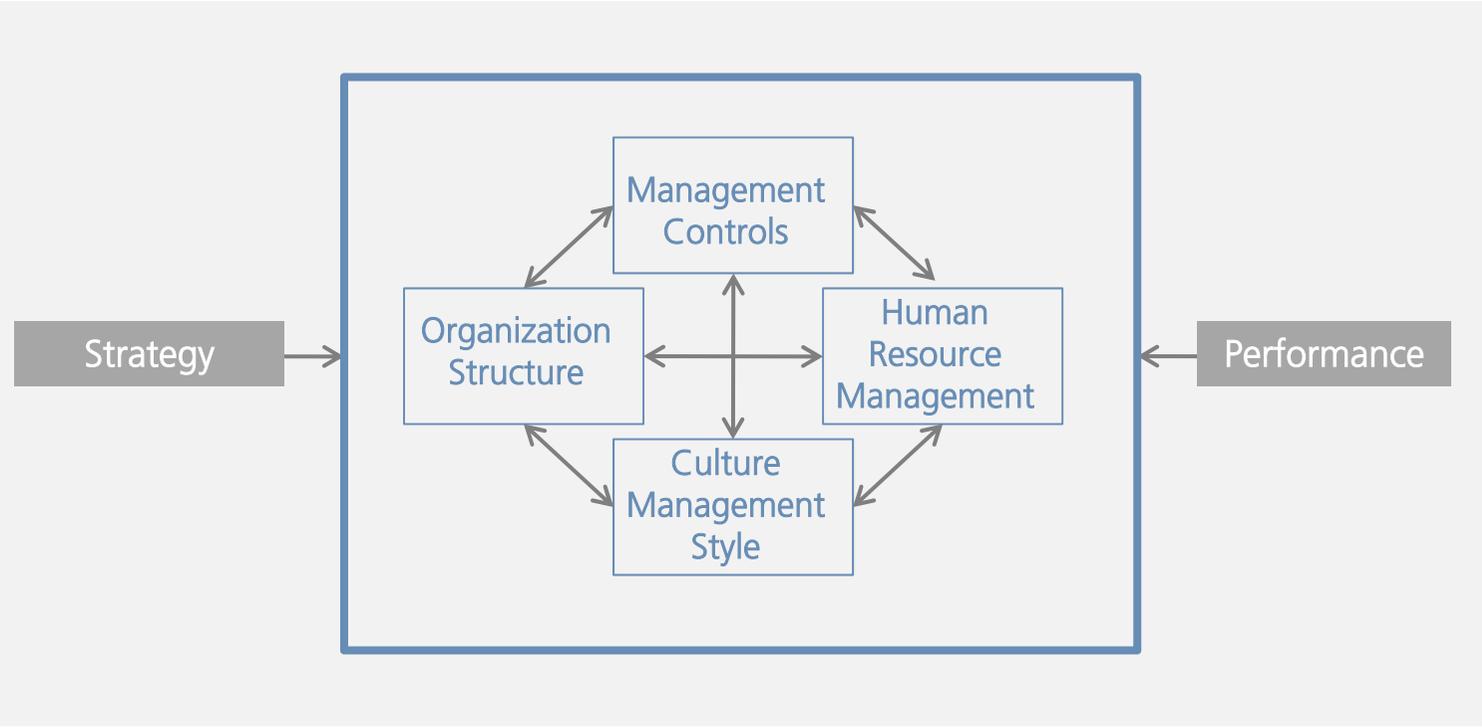


# Designing the right culture

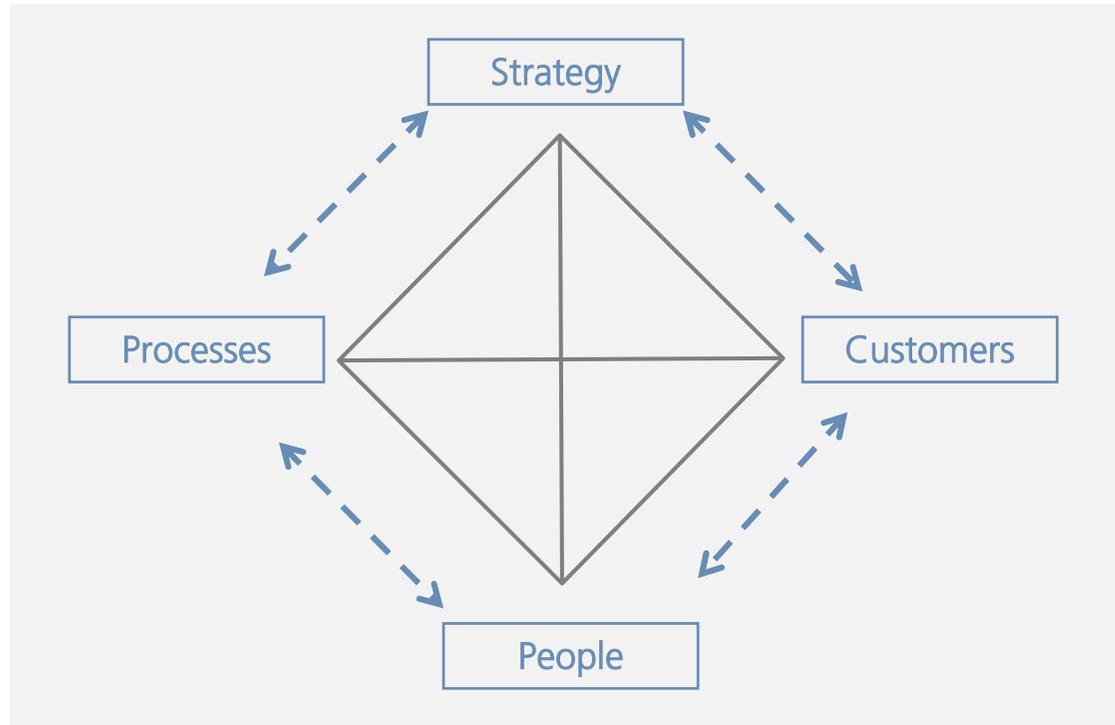


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# Framework for Strategy Implementation

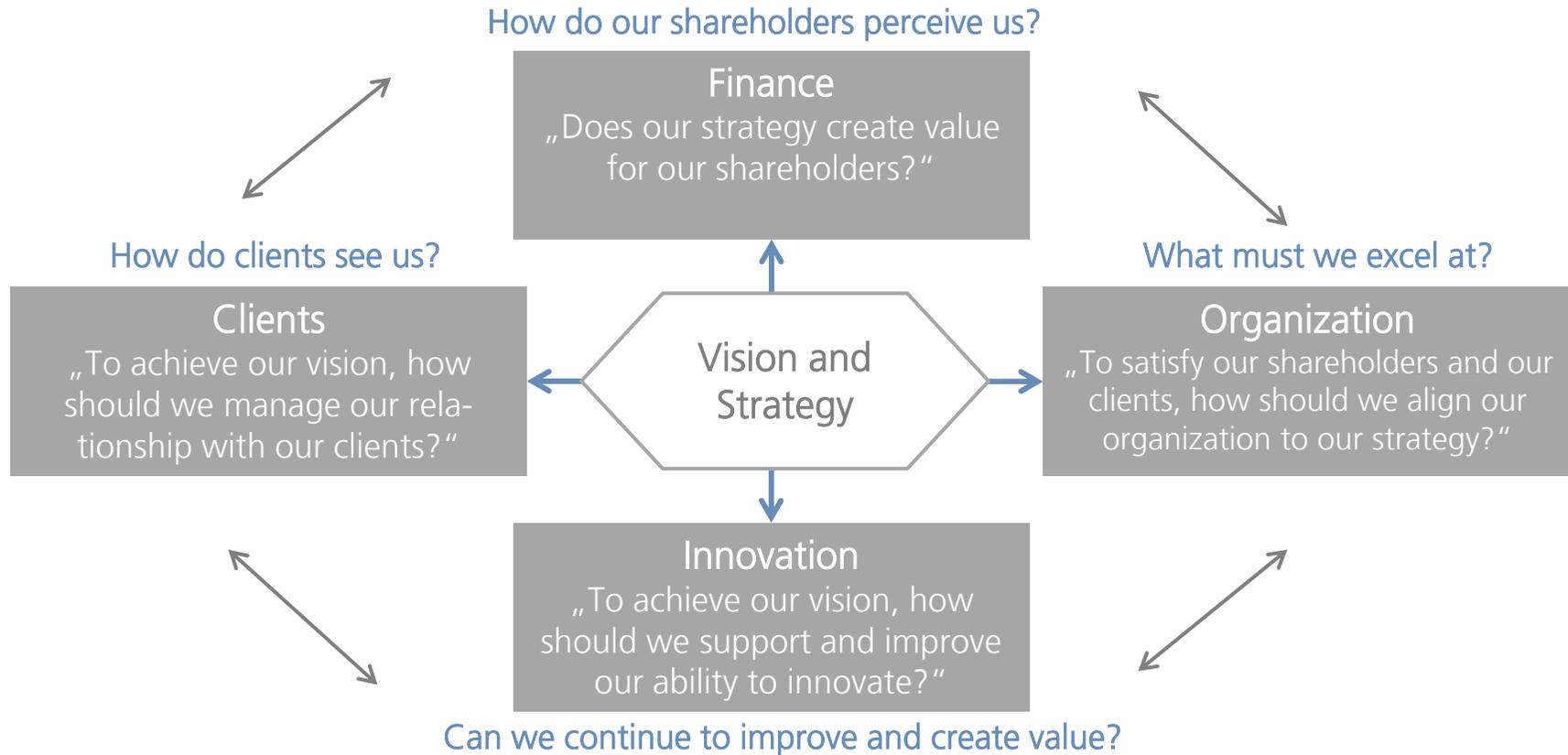


# Full Alignment

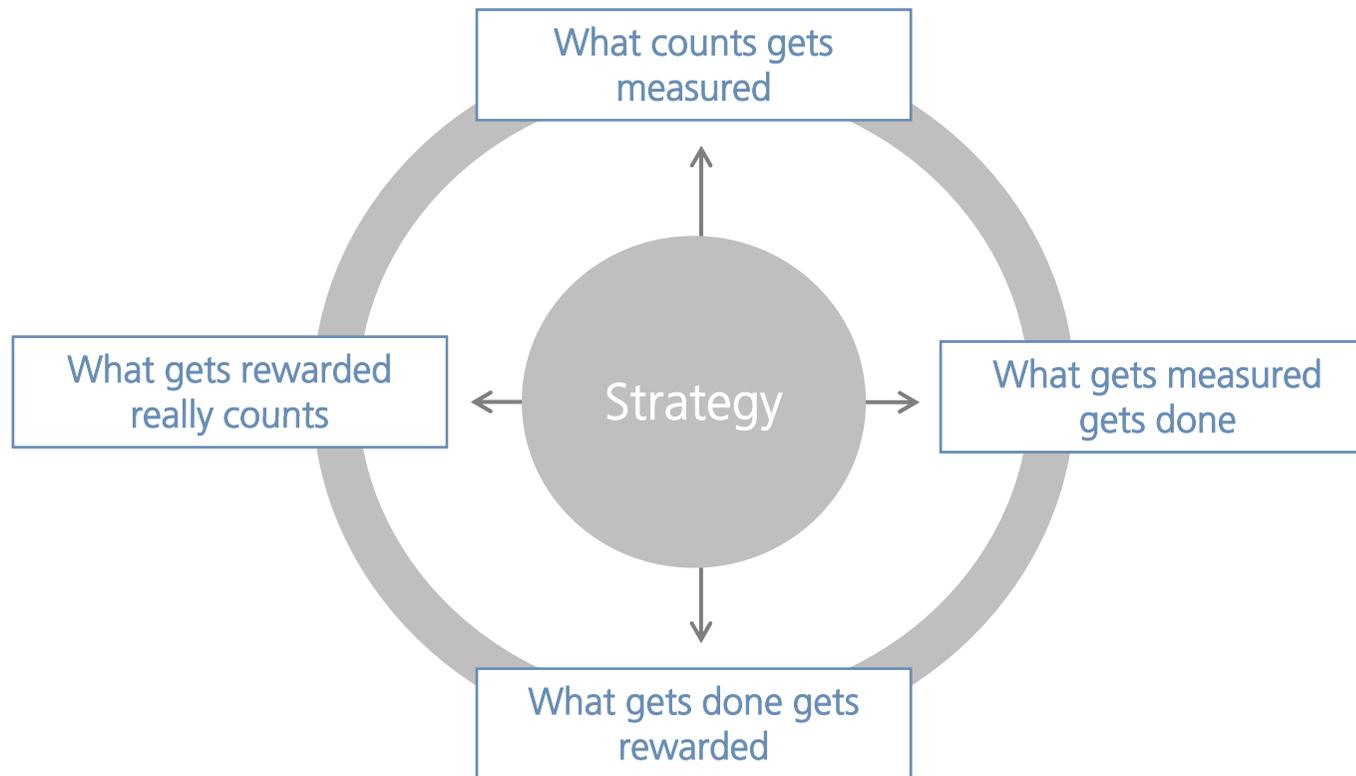


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# A Balanced Scorecard is Designed on the Basis of a Shared Strategic Model



# The Behavioral Perspective

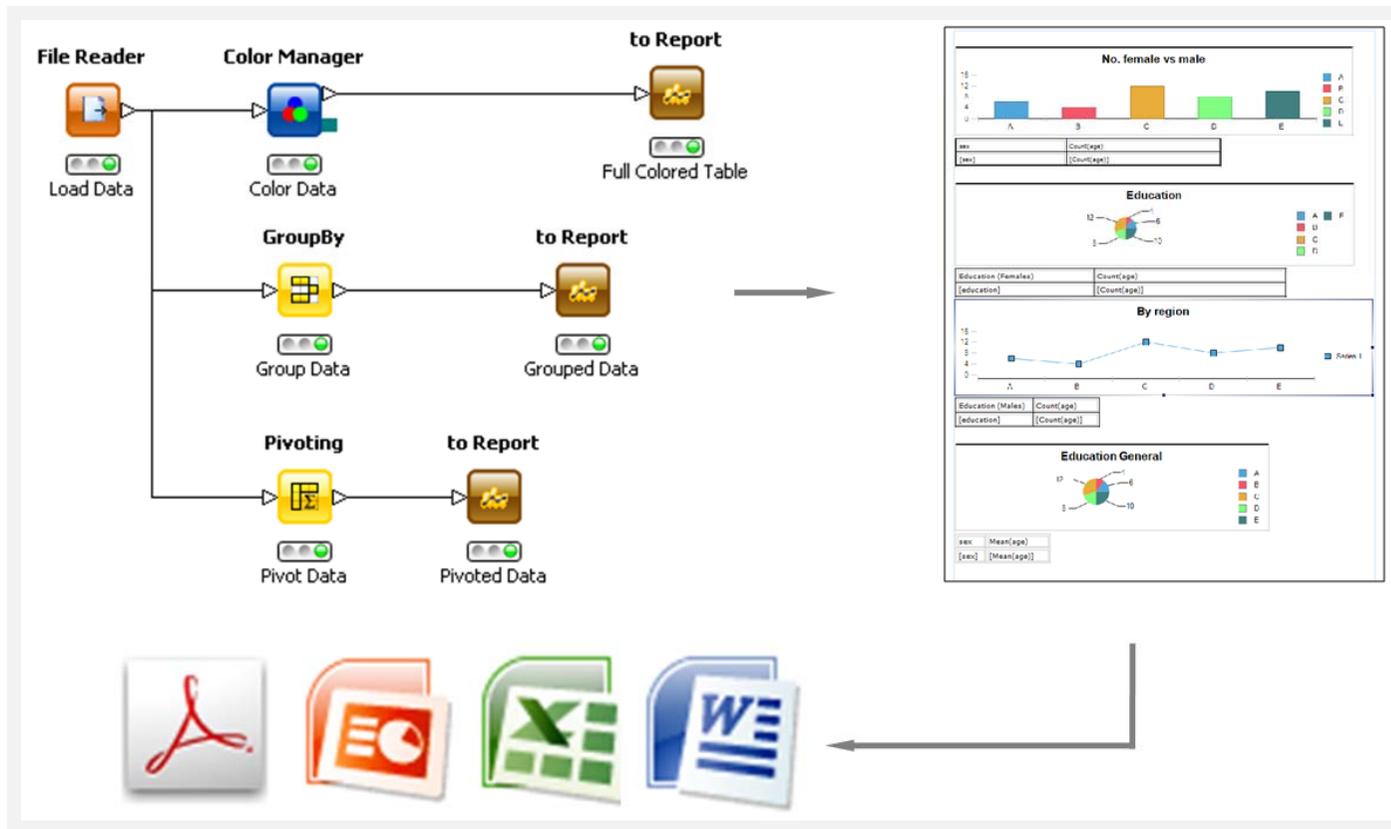


# Evolutionary Data Management

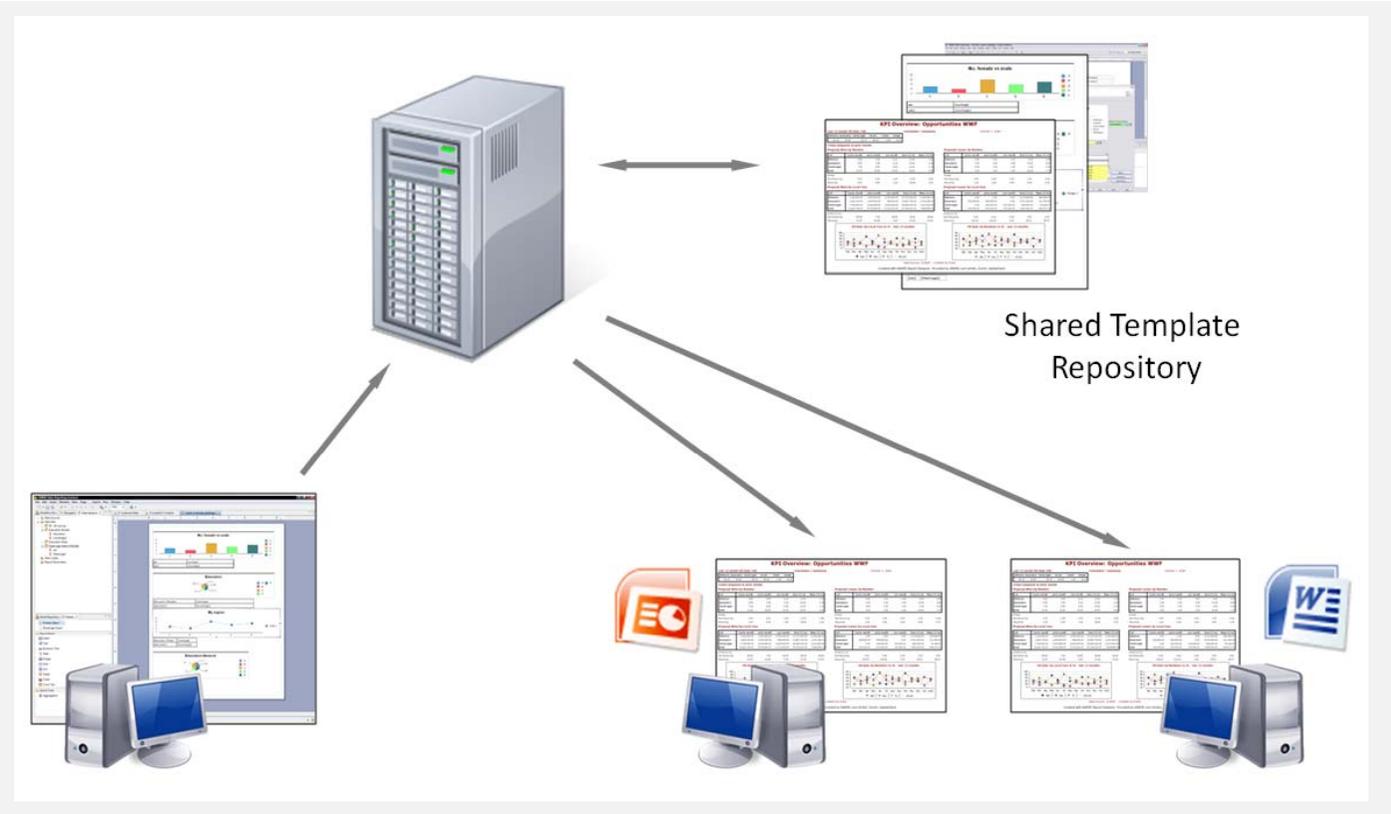


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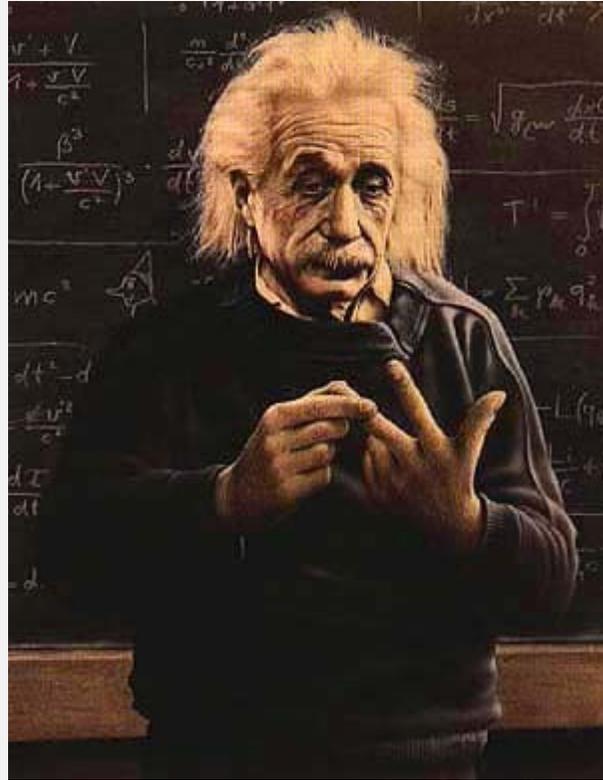
# Process Ownership



# Integrated Risk Management



# Systematic Company-Wide Knowledge Management



Gain competitive edge by wisdom



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# Appendix



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# CV Gregor Bienz



## Gregor Bienz, CEO, Head Relationship Management

Mr. Bienz has 20 years of experience in global financial markets. Before joining Bank Frey, he spent 9 years with Dresdner Bank, his latest positions being Advisor to the Executive Board, Chief Investment Officer Private Banking International, Head Investment Center for Switzerland and Co-Head Equity Research Dresdner Bank Frankfurt. Before his tenure at Dresdner, he worked for UBS for 9 years.

Mr. Bienz holds a Federal Diploma in Swiss Banking and an Executive Master in Corporate Finance from the University of Applied Science of Central Switzerland. He is a Certified European Financial Analyst (CEFA), Chartered Alternative Investment Analyst (CAIA) and holds a Financial Risk Management license (FRM). Furthermore he received his Executive MBA (TRIUM) of NYU Stern, HEC Paris and LSE.



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