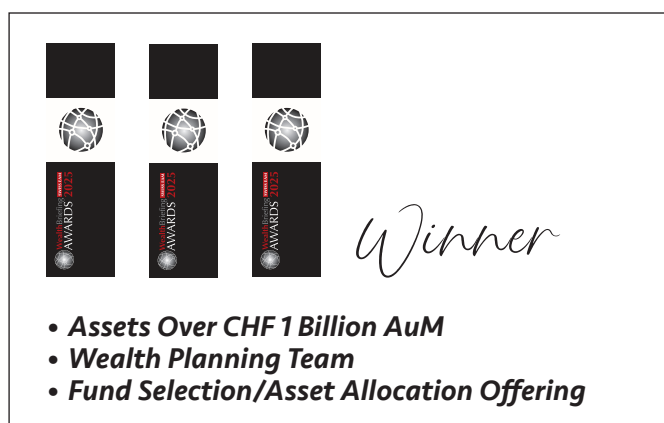


# A Collaborative Culture is the Winning Formula

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



We are delighted to be the recipient of three *WealthBriefing* accolades for 2025. Forum Finance has evolved over the last 30 years 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.

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

We are very grateful to the independent panel of judges for their diligent work and could not be more delighted with our three awards. These awards are a real testament to our consistent investment and planning for the company over many years. Our winning formula may be the combination of our focus on how we can best serve our clients and how we can best inspire our employees.

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.

## **What sort of challenges did you surmount to reach this level and how have you been able to succeed in such fast-moving circumstances?**

Finding the right people to partner with remains a real challenge, but we have been fortunate to find like-minded people at all levels:

people who are keen to sign up to our collaborative culture. One has to create and demonstrate growth opportunities for everyone so that they can identify with the company and imagine their future development within it. We have many success stories at Forum Finance and that really excites all of us to work and stick even closer together.

The regulatory environment is a real challenge for very many smaller EAMs. It will prove too costly and time-consuming for them. We made all the necessary changes and investments many years ago with for example our FINMA and SEC licences since 2015 and 2016, respectively.

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

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.

We are therefore primed to welcome relationship managers from EAMs and banks alike. These coming years should provide us with a real opportunity to grow as a result.