

RECOGNISED AT THE SWISS EXTERNAL ASSET MANAGERS CEREMONY



Jean-Marc Gavillet (Managing Director), Laetitia Oguey (Marketing Manager), Joe Mirante (Founder & CEO), Frank Crittin (CIO), Sébastien Berthoud (Managing Director)

MFM stood out at the WealthBriefing Swiss EAM* Awards 2024 ceremony in Zurich as a major player in independent wealth management in Switzerland, winning the following awards:

- Best Wealth Management boutique based in Vaud
- Best Investment process
- Chief Executive Officer (CEO)

* EAM - External Asset Managers

The judges were impressed by your articulated investment process. How do you explain such success?

Frank Crittin: Our unique investment strategy, which is based on risk budgets combining fundamental analysis and quantitative decision-making tools, has certainly made the difference.

I am extremely proud of our team of quantitative analysts who have been developing high-level tools for several years, both in terms of the quality of databases and innovative approaches to portfolio construction. The positive impact of these tools on our investment process is significant. Moreover, it reflects our constant commitment to progress through innovation.

What does winning the award for best wealth management boutique in Vaud represent for your team?

Jean-Marc Gavillet: It is truly exceptional to win the award for the third time as the best independent wealth manager in the Canton of Vaud, following 2021 and 2023. This recognition reflects the continuous commitment of our entire team to our clients. It confirms the relevance of our comprehensive wealth management offering, which combines classic wealth management, management of pension schemes (base plan, 1E, vested benefits, or 3A), foresight planning to ensure a serene retirement, and mortgage financing.

Sébastien Berthoud: The financial markets have been extremely challenging over the past four years, and our management teams have done a remarkable job to protect our clients' wealth. This positive performance in a particularly difficult environment deserves recognition. This award recognizes the constant efforts of our wealth managers to provide high-quality services to our clients. Furthermore, we are actively seeking to recruit new talent to strengthen our team given the appeal of our service offering.

And you, Mr. Mirante, you are leaving with the Best CEO award. The jury mentioned that you stood out for your work ethic and constant pursuit of improvement.

Giuseppe (Joe) Mirante: I am deeply honored to have won the award for best CEO. Honestly, I still find it hard to believe that MFM is 20 years old this year. Our independent, human-sized structure has allowed us to be agile and constantly adapt to market conditions, hence its longevity. I am sincerely very proud of the journey we have taken and thank all the people who have contributed to such success.