



## **Bergos goes live with New Core Banking System on FNZ Platform**

- *Bergos AG, a Swiss private bank, has successfully gone live with a new core banking system in partnership with FNZ, the global wealth management platform.*
- *The solution, which was implemented in eight months, encompasses core banking and client data management applications, as well as a completely new e-banking platform.*
- *The new e-banking capabilities include the native Bergos Mobile App, which allows customers to interact with the advisor, enter payments and trades, view account balances and documents.*
- *Phase 1 of the project has been completed, with further enhancements planned for later in 2023 to improve the customer experience in private banking, advisory and asset management.*
- *The partnership strengthens FNZ's expansion into Switzerland, its offering in the private banking sector and will allow FNZ to offer more comprehensive solutions to its customers.*

**31 January 2023, Zürich:** Bergos AG, an independent Swiss private bank specialized in wealth management, is delighted to announce the successful go live of its new core banking solution in partnership with global wealth management platform, FNZ. The successful implementation of the core solution was delivered in eight months thanks to the close collaboration and partnership between both companies.

Through its new e-banking capabilities, Bergos clients can now access the Bergos Mobile App, where they can take advantage of a range of features that allow them to manage their finances on the go. The app is designed with user-friendliness in mind and has an intuitive interface that makes it easy for customers to navigate.

This launch marks the successful delivery of phase 1 of the project, with further improvements planned for later in 2023 including enhancements to the customer experience, with a focus on Private Banking, Advisory and Asset Management.

The new platform includes digital-first SaaS-based core banking and wealth management technology, infrastructure, and operational services. This will allow Bergos to better serve its customers by providing them with more convenient and efficient banking services, while also streamlining internal processes and improving overall efficiency.

After a comprehensive review of various vendors, Bergos selected FNZ to support its digital transformation and enhance its functional capabilities. The Swiss private bank decided to modernize its existing systems by choosing a fully integrated API-driven platform that is consistently focused on the digitalization of private banking specific processes.



**Dr. Peter Raskin, CEO and Partner of Bergos, said:** "The needs of our clients and the development of a long-term relationship are at the heart of Bergos. As a bank dedicated to human private banking, we want to draw on the potential of state-of-the-art digital solutions to best equip our teams with the tools they need so they can dedicate their time to their clients."

**Philippe Bongrand, CEO Switzerland FNZ, said:** "We're delighted to have supported Bergos in achieving this exciting milestone in their digital transformation journey. I'd like to congratulate both teams for their exceptional achievements in delivering this platform and we look forward to continuing our partnership together."

**Vincent Jeunet, Deputy Head Managing Director FNZ Switzerland & Private Banking, said:** "The partnership highlights the strengths of both companies and opens up new opportunities for us to further develop our product range in private banking."

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#### **About Bergos AG**

Bergos AG is an independent Swiss Private Bank with a focus on Private Wealth. Bergos emerged in 2021 with a new shareholder base from its former mother company, Joh. Berenberg, Gossler & Co. KG, 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 100 employees, the focus is on providing expert guidance in all known liquid and non-liquid asset classes, as well as alternative investments such as real estate, private equity and art. 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, intergenerational service that focuses on security, neutrality, internationality and openness to the world, in addition to investment recommendations.

#### **About FNZ**

FNZ is the global platform provider in the wealth management sector, partnering with over 650 of the world's leading financial institutions and over 8,000 wealth management firms.

With about 6,000 employees in 21 countries, FNZ's mission is to open-up wealth, helping everyone, everywhere to invest in their future on their terms.

FNZ combines technology, infrastructure, and investment operations in a single state-of-the-art platform that frees its partners to create hyper-personalized and innovative products and services, that are seamlessly aligned with the needs of their clients.



To date, FNZ administers more than \$1.5 trillion in client assets and has enabled over 20 million people, from all wealth segments, to invest in an effective, simple, and transparent way, making wealth management accessible to everyone. For more information, please visit [www.FNZ.com](http://www.FNZ.com) and follow us on LinkedIn (@FNZ Group).

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