

Beatrice Zwicky

Member of the Executive Board, Head of Wealth Management and Founding Partner



In recent years, Beatrice Zwicky has dedicated herself to the subject of financial literacy, most recently in a study by Investor's Dialogue in cooperation with the Zurich University of Applied Sciences in Winterthur, as well as in seminars intended to combat illiteracy. At the same time, she held a leading advisory position for private banking institutions at Valuefirst Management Consulting.

Prior to this Beatrice Zwicky was head of Product Management at the Swiss Association of Raiffeisen Banks, where she was responsible for all retail products, focusing on sustainability funds. The objective of this engagement was to establish a private banking organization for cooperative banks in Switzerland, first via DG Bank and later in a project with Bank Vontobel.

She acquired her private banking expertise working at Bank Leu both in planning and support and in management functions with a client advisor team. Her professional career began at Zürcher Kantonalbank, where she produced economic analyses and forecasts and went on to build up the Market Research department.

Beatrice Zwicky holds a Degree in Economics from the University of Zurich and a Diploma from the Swiss Banking School.

«Money is more than just a performance-oriented means of investment. Used in the right way, it can help to shape the future in the way the investor has in mind. I want to work with Forma Futura to encourage these decisions.»