

Globally connected, close to our clients: 20 years of wealth management in Germany

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In 2026, Bank Julius Bär Germany AG marks 20 years of wealth expertise, supporting private clients, entrepreneurs, and wealthy families across Germany through a nationwide network of ten locations.

What began with a small number of relationship managers has evolved significantly over the past two decades. Today, teams across Germany support wealthy clients, entrepreneurial families, and foundations in addressing increasingly complex wealth matters.

The heritage behind Bank Julius Bär Germany AG reaches much further back than 2006. In 1890, the foundations for today's internationally active Julius Baer Group Ltd. were laid in Zurich. Bank Julius Bär Germany AG, headquartered in Frankfurt am Main, is a wholly owned subsidiary of the Group.

Klaus Naeve, Chief Executive Officer of Bank Julius Bär Germany AG, explains: "Julius Bär Germany has stood for focused expertise in wealth management for 20 years. We are guided by an overarching goal: to support our clients in achieving their objectives and addressing their needs beyond the purely financial."

Julius Baer himself had German roots. Born in Germany in 1857, he later emigrated to Switzerland and joined the Zurich-based bank Hirschohorn & Grob in 1896. In 1901, Julius Baer & Co. was established and subsequently bore his name.

Learn more about the history of Julius Baer

This closeness forms the basis for another recurring theme at Bank Julius Bär Germany AG: trust as the foundation of every relationship. "To me, Julius Baer stands for reliability, consistency and trust – enabling us to support families who are considering not only the current generation, but also those to come," says Lutz Welge, Head of Asset Management, Bank Julius Bär Germany AG.

Beate Schemann, who supports clients in Wealth Planning Advisory on matters beyond the capital markets, describes this approach as a conscious choice: "Julius Baer stands for tradition – not in the sense of holding on to the past, but of consciously drawing on what has proven successful in order to find the best solution for each client."

Our clients often have complex wealth situations and, accordingly, highly individual needs when it comes to the support they require. "They appreciate Julius Baer's international expertise combined with personal advice," says Thomas Wunderlich, Head of the Munich branch.

What matters to clients depends greatly on their particular stage of life: some are building and structuring their wealth, while others are preparing to pass their life's work on to the next generation. Alongside professional expertise, helping clients navigate an increasingly complex environment also plays a central role. Schemann adds: "I know we have done a good job when clients gain clarity – when decisions that had previously remained unresolved suddenly become possible."

Local expertise, internationally connected

Julius Baer's range of services is aligned with the individual and often complex needs of its clients. The organisation combines its local expertise in Germany with the international network of the Julius Baer Group, for example when it comes to structuring wealth and planning across generations.

This international connectivity is particularly valuable when dealing with cross-border matters. "If, for example, a succession-related question arises somewhere in Europe, my colleagues in the respective countries are available to contribute their expertise," Schemann says, describing the advantage.

Germany plays an important role within this international network. "Germany is the largest economy in Europe," Welge emphasises. "Significant wealth has been built here over generations and is now being passed on." The German market is particularly characterised by the strength of its Mittelstand: entrepreneurial families that have built wealth over generations, alongside a new generation of entrepreneurs from the technology and new-media sectors.

Ten locations, close to clients from north to south

"We are currently represented at ten locations across Germany, from north to south," says CEO Naeve. These locations are:

This regional presence is a deliberate strategic choice. "Every region has its own characteristics and areas of focus, and it is important to us to take these into account," Naeve explains. Frankfurt, as a financial centre, has different priorities compared with Munich, with its mix of Mittelstand, innovation and industry, or the Hanseatic city of Hamburg, which has always had a strong international outlook.

At the same time, this local proximity is embedded within a solid international framework: Julius Baer is represented in 25 markets with around 60 locations worldwide. The German locations can draw on the expertise of this international network.

Germany's economy at a glance (as of 2025)

For Julius Baer, 20 years of wealth management expertise in Germany is not only an opportunity to look back, but also a starting point for the next stage of its development.

"For 20 years, we have grown together with our clients," says Naeve. "The combination of German virtues, Swiss precision and financial strength appeals to clients who value our professional service."

Looking ahead, Bank Julius Bär Germany AG will continue to focus on combining personal relationships, local expertise and international connectivity.

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Over the past two decades, Bank Julius Bär Germany AG has built a network of ten locations, bringing its wealth management expertise closer to clients and reflecting the distinct needs of different regions across Germany.

From succession planning to cross-border wealth matters, clients benefit from local expertise in Germany combined with Julius Baer's international network spanning around 25 countries and 60 locations worldwide.

Given the strength of the German Mittelstand and the substantial assets being transferred between generations, long-term relationships and trust remain crucial in supporting entrepreneurial families and wealthy clients.

Helping you grow and preserve your wealth with smart planning.

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