



# ACCLAIM

RECOGNISING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY  
THROUGH THE *WealthBriefing* AWARDS PROGRAMME



The Fifth Annual *WealthBriefing*  
Swiss External Asset Management  
(EAM) Awards For Excellence 2025

March 2025

# Erlen Capital Management AG: Merging Tradition & Innovation in Asset Management Since 1995



**Bruno Schneller**  
Managing Partner  
**Erlen Capital  
Management AG**

Since 1995, Erlen Capital Management AG has been combining tradition with innovation in the asset management industry. Based in Zurich, we specialise in personalised wealth management for individuals, families, and institutions. Our independence, transparency, and flexibility ensure that we consistently meet our clients' unique needs. Our team's deep expertise and client-centric approach make us a trusted partner for long-term financial success.

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

Our success is built on strategic independence, client-focused solutions, and a commitment to continuous innovation. By prioritising our clients' interests and remaining agile in decision-making, we stay ahead in a competitive market. Our deep expertise enables us to identify emerging opportunities, ensuring we deliver impactful solutions tailored to our clients' needs.

#### **What are you going to do to remain competitive and stay ahead?**

To remain competitive, we continuously enhance our team's expertise by investing in ongoing professional development and fostering a culture of innovation. By integrating cutting-edge tools and systems, we strive to optimise operations and deliver tailored solutions that align with our clients' evolving needs. Our commitment to agility and adaptability ensures we stay ahead in the dynamic wealth management industry.

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

We've faced challenges like market volatility, evolving regulations, and the need to adapt to emerging technologies. Overcoming these required evolving our

approaches to maintain agility. By focusing on clients' evolving needs and fostering a culture of innovation, we've successfully adapted and continued to deliver exceptional results, embracing technology and our core values of independence and transparency.

#### **Who inspires you, either inside or outside your organisation?**

Internally, I'm continually inspired by our talented team, whose dedication and passion fuel our success. The mutual respect and collaboration we share enable us to innovate and overcome challenges. Externally, I'm inspired by leaders who drive change through innovation while maintaining ethical responsibility. Their commitment to sustainable growth reinforces the importance of blending innovation with responsibility in wealth management.

#### **How do you hope your firm will benefit from getting this award?**

This award enhances our reputation and visibility in the wealth management industry. It highlights the hard work and dedication of our team, boosting credibility and attracting new clients and professionals who share our vision. Recognition will also open doors for new partnerships and opportunities, enabling us to expand our network and further elevate our services.

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

In the next five years, the industry will focus on sustainability, digital transformation, and increasingly personalised services. Technological advancements, particularly in AI, will redefine wealth management. The demand for tailored, transparent portfolio management solutions will continue to grow. Erlen Capital Management AG remains committed to integrating innovation with tradition to deliver exceptional outcomes for our clients.



*Winner*

- **Assets Under CHF 500 Million AuM**



# ERLEN

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