

MEDIA RELEASE

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Lombard Odier establishes a Corporate Advisory centre of expertise

Lombard Odier is strengthening its value proposition by creating a new service for its entrepreneur clients: Lombard Odier Corporate Advisory. The service will support them in all strategic decisions related to the sale, transfer and governance of their businesses.

Dynamic market context and added value for our clients

In the next five years, nearly 2,000 SMEs in French-speaking Switzerland and 35,000 businesses in Switzerland as a whole will change ownership due to a sale outside of the family circle. To respond to this market dynamic and to provide its clients with holistic support, Bank Lombard Odier & Cie SA has inaugurated a Corporate Advisory centre of expertise, with the aim of offering a high-quality service in the area of company acquisition, sale and governance.

In establishing this new value proposition, the Bank has appointed Maxime Dubouloz and Jules Boudrand to lead Lombard Odier Corporate Advisory. Through their acknowledged skills, substantial experience in the domain of Corporate Advisory and ability to develop a dedicated team, they will broaden the Bank's ecosystem of services and consultancy for the benefit of its business-owning clientele. Having joined the Bank in November 2022, Maxime and Jules both report to Gérard Felley, Limited Partner and Head of Swiss and Francophone Private Client Markets.

Maxime Dubouloz has spent more than 16 years managing projects involving the sale, acquisition and valuation of SMEs associated with families in Switzerland and Europe. In his previous role as Head of Deals Western Switzerland at PwC, Maxime led the team responsible for acquisitions, mergers, divestitures and supporting clients in their succession plans.

Jules Boudrand has over 17 years of experience in mergers, acquisitions, divestitures and valuations in Switzerland and the United States for SMEs and entrepreneurs. Prior to joining Lombard Odier, Jules was head of the Corporate Finance Advisory team for French-speaking Switzerland at Deloitte, where he worked for nearly 15 years.

With a network of local and international investors, the Corporate Advisory team will support entrepreneurs and family businesses in the small and medium-sized company market. Operating under a dedicated advisory mandate, our experts will support mergers and acquisitions, financial and strategic structuring, and family business transfers.

Frédéric Rochat, Managing Partner at Lombard Odier, comments: “We have always sought to set the standard in private banking for entrepreneurs and their families over the long term. At a time when many business owners are preparing to hand over the reins of their companies and sometimes to restructure their wealth, we see the provision of this new expertise as a natural extension of our service offering.”

Gérard Felley, Limited Partner and Head of Swiss and Francophone Private Client Markets, adds: “Through our Lombard Odier Corporate Advisory centre of expertise, we aim to offer our entrepreneur clients differentiated and quality skills that match our in-house values. We are therefore very pleased to be able to count on the great experience that Maxime and Jules embody.”



About Lombard Odier

Lombard Odier is a global wealth and asset manager, and a leader in sustainable investing. For over 225 years and through more than 40 financial crises, the Group has combined innovation and prudence to align itself with the long-term interests of private and institutional clients. The Group is solely owned by its Managing Partners and has a strong, liquid and conservatively invested balance sheet with a CET1 ratio of 30% and a Fitch rating of AA-.

Lombard Odier provides a comprehensive offering of wealth services, including succession planning, discretionary and advisory portfolio management, and custody. Asset management services are offered through Lombard Odier Investment Managers (LOIM). The Group has created cutting-edge banking technology, which is also leveraged by other Swiss and European-based private banks and financial institutions.

The Group had total client assets of CHF 300 billion at 31 December 2022. Headquartered in Geneva since 1796, at end-December the Group had 25 offices in 20 jurisdictions and employed 2,720 people.

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