



# CASE STUDY: JULIUS BAER

## ABOUT JULIUS BAER



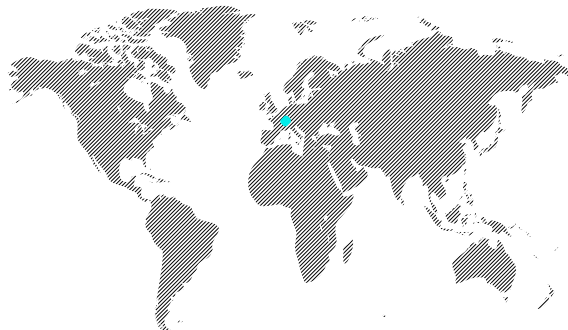
Julius Baer was the first wealth manager to establish in the DIFC. For more than 130 years, Julius Baer has managed clients' wealth and served them as trusted, truly personal and holistic advisors with an open product platform, a solid financial base and an entrepreneurial management culture making it the

international reference in wealth management. With roots as a family business, they know the value of long-term relationships, and the challenges and opportunities of growing wealth, protecting it, and passing it on.

Julius Baer in Dubai has grown from a small set up of a few

employees in 2004 to over 160 spanning over 29 nationalities including not only relationship managers but also teams from investment advisory, discretionary management, wealth planning and credit structuring. In all they do, Julius Baer is inspired by its purpose: creating value beyond wealth.

**ESTABLISHED:** 1890  
**ESTABLISHED IN DIFC:** 2004



Julius Baer is immensely proud to have been an integral part of DIFC's remarkable journey from its inception 20 years ago. Being DIFC's first licensed financial institution provided us with a first-mover advantage to access the region. Our long-term commitment is valued by our clients and continues to help us to attract new business. DIFC's platform and ecosystem is unmatched in the region and we looking forward to continuing to shape the future of finance together.

**Alireza Valizadeh**, CEO, Julius Baer (Middle East) Ltd

## WHY DIFC?

- Dubai has the highest concentration of wealth of any Middle Eastern city
- World class regulatory legal and regulatory framework
- Collaborative approach between clients, regulator and authorities
- Range of market entry options: representative office; asset raising and full relationship management (regulated); and portfolio management on the ground (regulated)
- USD 445bn+ DIFC Wealth & Asset industry size. USD 165bn AUM managed within DIFC
- 350+ Wealth & Asset Management firms