

Q: Elias, congratulations on your new role AS CEO. What excites you most about leading REYL Overseas Intesa Sanpaolo Group?

Thank you. What excites me most is the unique positioning of REYL Overseas Intesa Sanpaolo Group within Switzerland and Europe. We are registered with the SEC as an investment advisor and licensed by FINMA Swiss Financial Market Supervisory Authority as a portfolio manager, which allows us to serve US clients in a compliant and structured way, something that remains relatively rare.

There is a clear and growing demand from Americans in the U.S. and abroad and globally mobile families with US ties who are looking for sophisticated, cross-border wealth planning solutions. Given the current uncertain geopolitical environment and overall volatility, many are exploring diversification beyond their home country and US-centric investment portfolios. That creates a compelling opportunity for us.

Q: You've set an ambitious growth target. What is your vision for the firm over the next five years?

We believe it is realistic to grow the business to over USD 1 billion in assets under management within five years.

This growth will come from deepening relationships within our existing network, particularly with CPAs,



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attorneys, and U.S.-based investment advisors who are often the first point of contact for clients navigating cross-border opportunities.

At the same time, we will continue to work directly with clients, offering tailored solutions that integrate long-term planning, asset protection, and investment management within a fully compliant framework.

Q: How does REYL Overseas differentiate itself within the broader REYL Intesa Sanpaolo group?

REYL Overseas operates as a distinct entity within the group, with a very specific focus: serving U.S. persons globally.

Our “sandbox” is different. While we benefit from the strength, infrastructure, and global reach of REYL Intesa Sanpaolo, our regulatory framework, client base, and service model are specialized.

This allows us to combine institutional backing with a highly focused, client-centric approach tailored to the unique needs of U.S.-connected clients.

Q: Your background spans both Switzerland and the United States. How has that shaped your leadership approach?

I was born in Switzerland and raised in the United States, with family connections spanning Switzerland, US, Peru, and India. That international perspective has always been part of who I am.

Professionally, I spent nearly 16 years at BSW Wealth Partners in Boulder, Colorado, helping build a USD 2 billion registered investment advisor and leading the investment group. My focus there was on developing efficient, scalable investment processes across both public and private markets.

Returning to Switzerland has been a personal goal for a long time, it feels like coming full circle. I bring both a US advisory mindset and a Swiss appreciation for structure, stability, and long-term thinking.

Q: What is your investment philosophy when working with internationally active clients?

We take a “go-anywhere” approach to portfolio construction, always anchored in risk management.

That means building diversified portfolios using a broad set of ingredients, global equities, fixed income, commodities, currencies, and precious metals, depending on the client’s objectives and constraints.

We are also thematically driven investors, with a long-term horizon. The goal is not short-term positioning, but rather building resilient portfolios that can adapt to changing global conditions.

Q: How do you approach client relationships in a cross-border context?

We see ourselves as a “boots-on-the-ground” partner for families and individuals navigating international lives.

That includes not just investment management, but also coordination around custody, lending, cash management, and broader wealth structuring considerations.

For many clients, expanding their footprint, whether financially or geographically, requires a trusted partner who understands multiple jurisdictions and can work alongside legal and tax advisors.



Q: Finally, what are your immediate priorities as CEO?

In the near term, my focus is on three areas:

- Strengthening our partnership with Intesa Sanpaolo, particularly in delivering solutions for U.S. clients within that ecosystem
- Driving U.S. business development, both through direct client relationships and advisor partnerships
- Ensuring strong governance and fiduciary oversight, which remains central to everything we do

At the same time, we are building on a solid foundation established since 2011, when REYL Overseas was created in response to FATCA and the growing need for dedicated US-compliant wealth management solutions.

The opportunity ahead is significant and we intend to approach it with discipline, clarity, and a long-term perspective.

Elias Bachmann is CEO of REYL Overseas Intesa Sanpaolo, based in Zurich. A dual US/Swiss citizen and CFA Charterholder, he previously spent 16 years at BSW Wealth Partners in Boulder, Colorado, where he was a partner and head of the investment group. He brings extensive experience in cross-border wealth management, portfolio construction, and serving internationally active clients with US connections.

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