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July 2019

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FOREWORD

Tom Burroughes, Group Editor, *WealthBriefing*

The *WealthBriefing* European Awards raise a salute to the practitioners in the wealth management sector who have set the highest standards and who continue to push the industry forward. It is important to acknowledge the work that is done to keep this industry on the front foot: the value of a thriving wealth management sector is not always appreciated. These awards help to fill an important gap and boost morale. This news organisation also knows that running these awards is also a great way to stay on top of industry trends and ideas. And industry figures can observe their peers and see what's necessary to remain successful in future.

The linchpin of these awards is the judging process. A panel of judges, drawn from senior figures at banks, technology providers, law firms, multi-family offices, consultancies and other institutions work through entrants' submissions to draw up the winners. Judges bring their experience and knowledge to the table in making their decisions. Crucially, the quality of a submission provides most of the weight in deciding whether an entrant is shortlisted and eventually selected as a winner. If a firm or person hasn't entered the awards, they cannot be selected. Another vital point is that judges are split into groups so that they don't scrutinise entrants from their own sectors. For example, a private banker cannot judge another private bank. This process avoids potential conflicts of interest, bias and possible access to confidential information. The list of judges is published on this publication's website. We regularly review award categories – feedback is essential.

Reputation counts for a great deal in today's business world and these awards are valuable aids to marketing and branding. The organisers of the awards also know how the very process of putting them together sheds light on trends in the sector.

The quality of the people in wealth management – their commitment, work ethic and belief in what they do – is what makes the difference. These awards salute that quality.

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OVERVIEW OF EUROPEAN WEALTH MANAGEMENT SECTOR

Sometimes it is hard to realise with all the geopolitical news that plenty of new wealth is being created on the continent as well as the UK. Europe has the third-largest total number of high net worth individuals (behind North America and Asia), collectively holding \$15.93 trillion (source: Capgemini, 2018). There are more than 4.8 million such persons in Europe, a figure that rose 7.3 per cent in 2017, according to latest figures.

The UK, France, Germany, Italy, Spain and the Nordics are home to some of the most important wealth management markets in the world – London alone is one of the world's top three financial centres and by some definitions, the world's leading offshore financial centre (not all practitioners will like that description). Germany is home to a large number of private banks

and family offices. Its market is overwhelmingly domestically focused and tends not always to garner the attention it deserves. France's market is host to some of Europe's big-hitters in the wealth space: Crédit Agricole (parent of Indosuez Wealth Management), Societe Generale and BNP Paribas are international in scope. The small state of Luxembourg, the prominent home to the pan-European UCITS funds sector, has along with Ireland benefited from some migration out of the UK amid concerns about access to the European Union post-Brexit.

But even with the controversy over the UK's vote to leave the EU, it has not been all one-way traffic: overseas banks such as Bank of Singapore, for example, have set up shop in London, while a cluster of Swiss banks operate from the capital. UK-headquartered players such as

Coutts, Barclays and HSBC Private Banking are joined by a long cohort of medium-sized banks and wealth managers, multi-family offices and specialist advisory businesses.

This is a sector that wrestles with challenges such as squaring the need to spend on complying with ever-increasing rules with business expansion and new ideas. A bit of the hype about "robo" platforms might have worn off but the digital transformation of this industry isn't going away. And the need to grow new talent to handle intergenerational wealth transfer and investment needs remains ever present.

Europe has its challenges: the region needs more economic growth and jobs. A vibrant wealth management industry is vital to ensure capital is steered to where it can achieve the most results.

JUDGING PANEL

The 2019 *WealthBriefing* European Awards programme was focused around three main category groupings: **experts** (individuals and teams), **products** and **services** for wealth managers and clients, and institutions of all sizes and types in the European market.

Independence, integrity and **genuine insight** are the watchwords of the judging process with the judging panels made up of some of the industry's top trusted advisors and bankers.



AUSAF ABBAS

Managing Director
Coombe Advisors



ROSALYN BREEDY

Partner
Wedlake Bell



MARK HUSSEIN

CEO, HSBC Life (UK) and
Head of UK Insurance
HSBC Bank



GILLIAN AUSTIN-KING

Senior Programme
Manager, CS-MIP
Programme
HSBC Bank



TOM BURROUGHES

Group Editor
ClearView Financial
Media



PENNY LOVELL

CEO, Private Investment
Office
Sanlam



PAUL AYRES

Partner
BDO



ETIENNE D'ARENBERG

Limited Partner
Mirabaud



KEITH MACDONALD

Head of Wealth
Management
EY



PHILIPPE BONGRAND

Senior Partner
Roland Berger



SEBASTIAN DOVEY

Founder
The Courageous Ideas
Partnership



PAUL McMAHON

Founder
Insijt Consulting
Services



ERIC BARNETT

Non-Executive Director
SG Kleinwort Hambros
Bank



STEVE DYSON

Director
Investment & Wealth
Management
Consultants



TOM SLOCOCK

Managing Director
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Management



HANS-PETER BORGH

Group Head of Wealth
Management, Member of
the Management Board
Banque Internationale
a Luxembourg



MARTIN HEALE

Director
Schroder US Wealth
Management



ADAM SORRIN

Head of CRM Business
Solutions
RBS Private Banking

As part of the judging process, a shortlist was identified from the hundreds of entries received for these awards and the judges met for a round-table discussion to agree the winner for each category. The judges were split into groups, dependent on their industry. So trusted advisors were responsible for judging the private banking categories and private bankers judged the trusted advisor categories. This was to ensure that commercially sensitive information was kept confidential and conflicts of interest were avoided.

**STEPHEN WALL**

*Co-founder, Head of
Marketplace & Content
The Wealth Mosaic, UK*

**MATTHEW SPENCER**

*Managing Director and
Head of Intermediaries,
MFOs and Group
Referrals
Deutsche Bank*

**IAIN TAIT**

*Partner and Head of
Private Investment Office
London & Capital*

**BRUCE WEATHERILL**

*Chief Executive
Weatherill Consulting*

**WENDY SPIRES**

*Head of Research
ClearView Financial
Media*

**WILLIAM TROUT**

*Head of Wealth
Management Research
Celent*

**IAN WOODHOUSE**

*Head of Strategy
and Change,
London & Zurich
Orbium*

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At EY Financial Services, we share a single focus — to build a better financial services industry, not just for now, but for the future. We train and nurture our inclusive teams to develop minds that can transform, shape and innovate financial services. Our professionals come together from different backgrounds and walks of life to apply their skills and insights to ask better questions.

It's these better questions that lead to better answers, benefiting our clients, their clients and the wider community. Our minds are made for transforming financial services. It's how we play our part in building a better working world.

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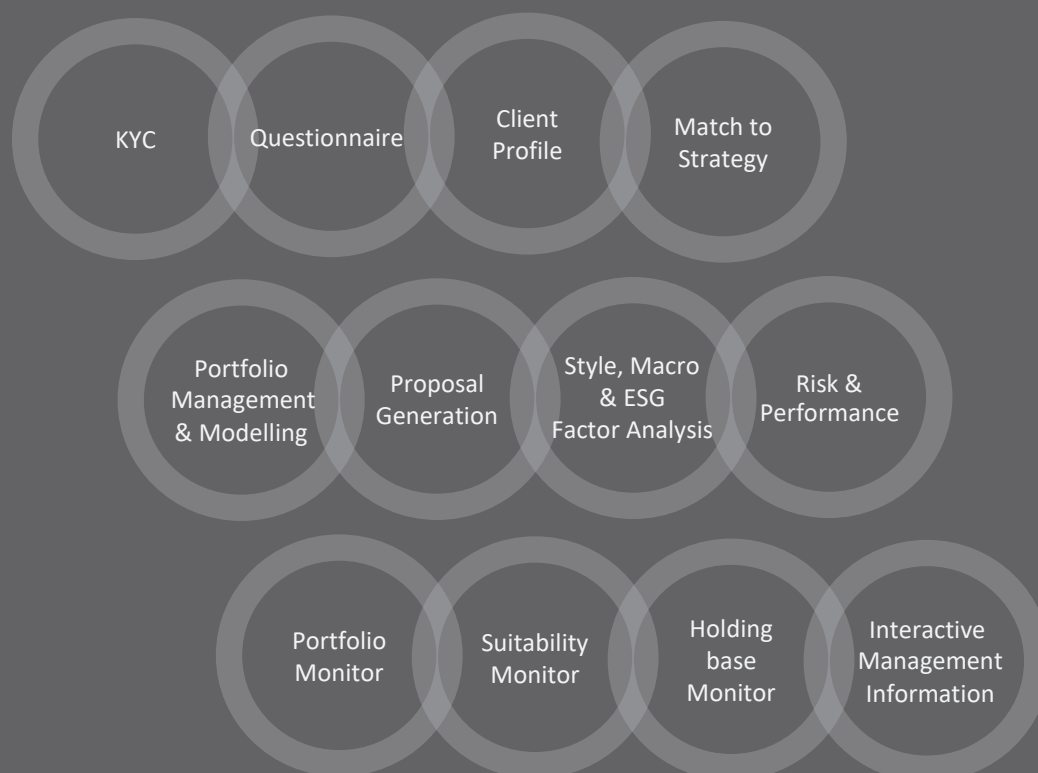
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WHATEVER IS RIGHTLY DONE, HOWEVER HUMBLE, IS NOBLE.

– BITA RISK'S PHILOSOPHY IN HELPING MANAGERS WITH SUITABILITY AND RISK & PORTFOLIO MANAGEMENT

Daryl Roxburgh, Global Head, BITA Risk talks to Tom Burroughes from *WealthBriefing* about its success in the awards.

BITA Risk, part of corfinancial, won two awards this year: **Best Risk Profiling** and **Best Implementation**, adding to its history of wins for *Risk Management*, *Portfolio Construction*, *Client Service* and *Product Innovation*.

What sets you apart from your peers this year?

Risk Profiling Award: BITA Wealth Profiler takes a different approach to its peers - focusing on the integration of risk profiling with the firm's investment proposition and using profiling to educate the client on the risks inherent in a portfolio and help reach a common understanding with their manager.

BITA's proprietary questionnaire does not focus on a single number outcome for a client, but delivers a series of parameters that aid the manager's decision process when selecting a suitable investment approach. It makes the client mandate a living document rather than a static filed paper, embedding it within the daily management of the client portfolio.

BITA Risk's proven end-to-end approach to risk profiling is based on seven key principles:

- 1) Give the client a clear understanding of what risk is, what it means to them and the trade-off between risk and return.
- 2) Link results of the client profile directly to portfolio constituents and construction for portfolio consistency with profile and a playback report to ensure client understanding and correct profiling, rather than just relying on it being statistically likely fit, with no risk context.
- 3) Establish a trust and common understanding of risk between the client and their manager on a consistent basis across managers and set parameters for the future portfolio risk management.
- 4) Not relying on a single risk profile score, but up to 12 parameters including need for risk, attitude to risk, capacity for loss, time horizon and liquidity together with goal and decumulation criteria. These can be considered individually and in the context of wider KYC data to arrive at the suitable risk profile for the client.
- 5) Have a questionnaire that works for individuals, trusts, charities and corporate bodies equally well due to its empirical nature, questionnaire branching, and options for multiple wording sets and languages.
- 6) Identification and resolution with the client of any inconsistencies in their answers and aspects of their profile.
- 7) Work as an integral part of the investment and risk management process, transparent to the client, who can see how their questionnaire responses will influence the on-going management and suitability of their portfolio.

Wealth Profiler is modular and uses API integration to sit on top of core systems, leveraging existing technology investment and minimising project risk and spend. It is self-documenting, storing key data and automatically saving documents to a DMS and via API integration, instantly sharing profile data between systems.

For the Best Implementation award, being on-time, on-budget and having private client managers pleased with the solution that we delivered, set us apart. This was demonstrated by a published case study in which the client said: "We knew that BITA Wealth Monitor had been implemented successfully and rapidly by industry peers, and there were people working here who'd come from those firms and used the system before giving very good feedback."

When asked about the process, the client commented that: "Implementation was an incredibly flexible, communicative process. We were able to sit down with the BITA project team to describe exactly what we wanted and they programmed those flags into the system precisely as we defined them. They were able to produce an initial cut of the system that we could test before then further honing it to ensure it was doing everything we wanted it to do."

Other comments include: "Compared to other system implementations I've been involved with, this was very smooth." "The initial implementation was exactly in the timeframe we wanted to achieve, with a month spare actually, so that was great." "Our investment managers now have a far better overview of their portfolios and any issues that need to be looked at, and it's made dealing with those issues much easier as well." "The risk governance team have moved from a laborious monthly monitoring cycle, to getting the information they and investment managers need to see every day."

How have your colleagues contributed to the success of your organisation?

The BITA team is highly qualified with a combination of academic and industry experience and has built strong bonds with its clients. This results in sharing of ideas and a trust in our developing new approaches to solving problems.

The team is highly agile, and no I am not referring to their various sporting abilities or a development methodology, but to the way they look at challenges and by combining knowledge and experience across disciplines arrive at elegant and simple solutions to complex

problems. Working as part of corfinancial allows us to accelerate and incubate new ideas and strategies.

What will you do to keep to the standard of an award-winner and push ahead in the future?

The BITA Wealth road map is busy! We have client requests developing both our core functions and taking us into new areas. Bringing quantitative analysis to aid the private wealth investment narrative is one area based on our heritage; and looking forward, we have innovative ideas about mass customisation around ESG as another. There is no shortage of ideas.

What have the challenges been in obtaining excellence?

The most important is learning to say "no". It is flattering to be asked to undertake major development, but to maintain excellence, retaining focus is key. We have always said, "we do what we do, and do it well and to great depth". Only when the core is right, do we move onto the next idea.

Whom do you look up to for inspiration and examples to emulate and compare yourself against, either inside or outside the wealth management industry?

This may sound like a cliché, but service is key and, as above, that comes back to focus. There are many models in the software business that can be learnt from: Advent's growth from democratising wealth management software, Charles River's strength from sticking to core, and CGIX's pervasive nature through agnostic integration. Our focus is to deliver the right, high-quality products at a reasonable price.

What do you hope will be the main consequence of achieving this accolade?

As in previous years, these awards will underline the recognition of BITA Risk's products within the industry. Our clients tell us that they are pleased and happy - having our direction acknowledged by the judges takes this message to a wider audience.

How will you use the award to raise your profile in the industry and among clients?

BITA's awards form part of its marketing literature and on-going PR campaigns. ■

For more information please visit:
www.corfinancialgroup.com/products/bita-risk

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A POTENT COMBINATION

Vincent Lecomte and **Sofia Merlo**, co CEOs of BNP Paribas Wealth Management tell **Tom Burroughes** from *WealthBriefing* about how its diverse business model has won over clients.

What sets you apart from your peers this year?

BNP Paribas Wealth Management is a leading global private bank and the largest private bank in the eurozone. We are present in three hubs in Europe, Asia and the USA. Our 7,000 professionals provide our demanding clientele with solutions to protect, grow and transfer their wealth. Clients benefit from our robust integrated, diversified business model with significant opportunities to benefit from the entire added value of the BNP Paribas Group (in particular the Corporate and Institutional Bank, Real Estate, and Asset Management).

We have €361 billion of assets under management with very good net asset inflows (€11.8 billion in 2018) coming in particular from Asia, France, Italy, Germany and the US.

We've made major investments to grow our business. In Europe, we acquired ABN Amro's private management business in Luxembourg last September, bringing us an additional €5.6 billion in assets under management. This acquisition strengthened our position in the large entrepreneur segment in Europe. In April of last year, we acquired the core banking operations of Raiffeisen Bank International's Polish arm. This positions us as the number one private bank in Poland, with a 13 per cent market share.

We continue to develop in Germany as well. Our strong Private Banking business, addressing the needs of a digital savvy clientele, has recorded impressive growth, and we have built a platform to address the specific needs of very high net worth (VHNW) and ultra-high net worth clients. We are focusing on the Mittelstand segment in a combined approach with our corporate and institutional bank and real estate. We are recruiting in Germany to support the growth of our platform across all segments.

Outside of Europe, our wealth management business launched in the US in 2011, targeting Silicon Valley entrepreneurs, and we stepped up with our opening in New York in April 2018. We manage over \$13 billion in the US at present, and we're targeting significant growth in the coming years. In the Middle East, we are

strengthening the VHNW clientele throughout the region.

We are expanding in our strategic markets in Asia. We are a market leader in North Asia and we are working to replicate our position of strength in South Asia, key to achieving our aspirations.

How have your colleagues contributed to the success of your organisation?

In 2019, BNP Paribas was awarded the most attractive employer in France in 2019 by the LinkedIn Top Companies ranking, honouring our efforts to attract talent and to retain our staff. The bank also obtained the exclusive Top Employers Europe 2019 Certification for creating outstanding employee conditions, and for nurturing and developing talent. These distinctions are proof of the high level of motivation associated with the rigorous recruitment and certification of our teams and ensure the success of our back and front teams.

What will you do to keep to the standard of an award-winner and push ahead in the future?

Our three strategic priorities are: focus on client expectations, leverage our expertise across the entire BNP Paribas Group and adapt our business model to changing client expectations.

We work closely with our clients to adapt our offering to meet their demands, such as in the field of impact investments and for direct investment in companies through equity funding or private equity.

The digital transformation of our business is accelerating. Working hand in hand with our clients, over 300 creative staff members in three design factories around the world are building an ambitious digital Client Experience leveraging all the opportunities offered by the latest technologies.

What have the challenges been in obtaining excellence?

It is all about anticipating change: be it client

expectations, technology, regulations or market conditions. But as The Bank for a Changing World, we embrace change!

Whom do you look up to for inspiration and examples to emulate and compare yourself against, either inside or outside the wealth management industry?

As a leading wealth manager, we seek inspiration outside our own sector: for example, the luxury industry is well-known for tailoring its products for the most demanding of clients, and for delivering an outstanding experience driven both by pleasure and added-value. We are also inspired by start-ups and fintechs, with whom we are already working.

For example by adopting new methodologies - a start-up mentality, design thinking, agile methods, design factories - we aim to offer exclusive services that dovetail with our clients' expectations and that have a faster time-to-market.

What do you hope will be the main consequence of achieving this accolade?

In the wealth management industry, only a high level of confidence motivates clients to entrust us with the management of their assets.

Even though our leading position and financial soundness may be well-known, winning three *WealthBriefing* European Awards this year for **Overall European Private Bank, Philanthropy Offering/Initiative of the Year** and **Outstanding Contribution to Wealth Management Thought Leadership** will be independent proof that clients can expect from us the highest level of quality.

How will you use the award to raise your profile in the industry and among clients?

Press release, websites news, social media, newsletters, e-mail signatures and much more: we will activate all our channels to promote this outstanding award.

Our relationship managers are very proud and always present our "gallery of awards" to prospects and clients! ■

“OUR **STRONG** PRIVATE BANKING BUSINESS, ADDRESSING THE NEEDS OF A DIGITAL SAVVY CLIENTELE, HAS RECORDED **IMPRESSIVE** GROWTH, AND WE HAVE BUILT A PLATFORM TO ADDRESS THE SPECIFIC NEEDS OF VERY HIGH NET WORTH (VHNW) AND ULTRA-HIGH NET WORTH CLIENTS.”

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Focused on performance.



We are entering a whole new era. Complex, interconnected, fast-paced - the world we live in is changing. The successes of the past no longer define the ways of the future. Knowledge, intuition and prediction become the key. Own your future today, with Capitalium Advisors. Leading the next chapter in Wealth Management.

CAPITALIUM'S INDEPENDENCE AND INVESTMENT FREEDOM SETS NEW STANDARDS FOR CLIENTS

Alain Zell, Chief Executive and Managing Partner of Capitalium Advisors, talks to Tom Burroughes from *WealthBriefing* about his firm's award-winning qualities.

Capitalium Advisors won the category of **Most Innovative Wealth Management Model** in the *WealthBriefing* European 2019 Awards. The firm develops solutions that are tailored for clients whether they are families, entrepreneurs or Millennials. The firm tries to simplify the financial lives of clients as far as possible.

The organisation is based in Geneva and is part of the CASA Group. The group advises Swiss and international clients on financial and non-financial aspects of asset management.

What sets you apart from your peers this year?

Company wise, we stick to our objective to offer a value-adding platform for wealthy families looking to set-up a robust financial strategy. As an independent structure, we benefit from an absolute freedom to shape tailor-made solutions. On the investment side, the differentiation states in our ability to develop solutions outside the crowded listed markets.

Again, the decision we made to exclude "retrocessions" from our business model creates a pipeline of unique opportunities.

How have your colleagues contributed to the success of your organization?

We maintain a start-up-like environment through a culture of innovation. We work on connecting each member of the team with our mission to transform the wealth management industry and to offer to our clients a unique financial experience.

In order to achieve our goals, complementarity of skills and characters has proven crucial to develop the company. Diversity is a key success factor.

What will you do to keep to the standard of an award-winner and push ahead in the future?

To become an award-winner is not an objective, but rather the consequence of business practices that have been turned into a successful business model. Or, at least, the testimony that you are doing something that is creating some value for you clients.

Our vision remains intact and we intend to continue to invest every penny we earn to

support our development and attract talented people who share our values and vision.

What have the challenges been in obtaining excellence?

The pursuit of excellence has somehow to connect with a high degree of enthusiasm. It requires a lot of efforts that must be balanced with positive energy in order to be sustainable in time. Besides, we are working every day to secure that our clients support the development strategy.

Ultimately, excellence is a relative concept versus your peers, as well as an absolute criteria driving each decision we make.

Whom do you look up to for inspiration and examples to emulate and compare yourself against, either inside or outside the wealth management industry?

Without any doubts, benchmarks and inspiration come from outside our industry. It is unlikely changes will emerge from within our sector. The vast majority of participants are facing profitability issues and fight for a status quo.

As a consequence there is no chance to find any inspiration under these conditions. The wealth management sector has suffered from a lack of governance and entrepreneurship that created inertia.

The divergence between outputs that would become commoditized and the one that will protect a high value proposition is getting bigger.

We are in the game for the second option!

What do you hope will be the main consequence of achieving this accolade?

The more people can get to know about our business model and the new standards Capitalium Advisors is raising, the better.

How will you use the award to raise your profile in the industry and among clients?

The perception of the industry about what we do is something we do not pay a lot of attention. Only the clients decides whether your value proposition make any sense. In that respect, the award can act as a testimony that we do deserve to have a close look at. ■

"COMPANY WISE, WE STICK TO OUR OBJECTIVE TO OFFER A **VALUE-ADDING** PLATFORM FOR WEALTHY FAMILIES LOOKING TO SET-UP A ROBUST FINANCIAL STRATEGY. AS AN **INDEPENDENT** STRUCTURE, WE BENEFIT FROM AN ABSOLUTE **FREEDOM** TO SHAPE TAILOR-MADE **SOLUTIONS**. ON THE INVESTMENT SIDE, THE DIFFERENTIATION STATES IN OUR ABILITY TO DEVELOP SOLUTIONS OUTSIDE THE CROWDED LISTED MARKETS."



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SUCCESS THROUGH TRUE INDEPENDENCE

Heather Tibbo, Group Co-Head of Family Office Services and **Paul Hunter**, Group Co-Head of Family Office Services from Crestbridge talks to **Tom Burroughes** from *WealthBriefing* on its award-winning feats.

Crestbridge is a global administration, management & corporate governance solutions business. Founded in 1998, it is privately owned - a contrast with several other firms in this space. It employs nearly 300 staff in six locations: Bahrain, the Cayman Islands, London, Luxembourg and New York. It was delighted to win the **Independent Trust or Fiduciary** category in the *WealthBriefing* European Awards 2019.

What sets you apart from your peers this year?

Crestbridge provides trustee and fiduciary administration services to established family offices and UHNW families seeking additional support on both a permanent and ad hoc basis. We are privately-owned, and truly independent, giving us the freedom to tailor our services to our clients' exact requirements.

Our independence means we can tailor our services to fit our clients' needs, both now and as they evolve, building long-term relationships around exceptional quality of service. We do not provide tax, legal or investment advice, making us free from conflict and able to focus on fiduciary responsibilities and our clients' best interests.

We work with numerous legal advisors and tax practitioners and other professionals and have a network of industry contacts which we work with collaboratively to ensure that our clients get the right advice when they need it most.

How have your colleagues contributed to the success of your organisation?

The team is led by industry leading figures Paul Hunter and Heather Tibbo, both of whom have an "incredible amount of international

private client experience", our dedicated team of 40 administrators and accountants, which includes nine additional global directors are considered, by clients, to be one of the strongest in the sector with a good balance of levels and experience.

We create a dedicated team for each client which is director led, pulling in competencies from across the whole business. Therefore, a client who is looked after primarily by our Family Office Services team may also be supported by key individuals from our Real Estate and Funds Divisions whilst also receiving the continued support of our operational staff. Our team has a thorough understanding of current market trends, corporate governance and management issues, which is invaluable as part of the ongoing administration and establishment of client trusts and investment vehicles.

What will you do to keep to the standard of an award-winner and push ahead in the future?

The key to our success is building and maintaining relationships with our clients which are founded on trust, integrity and transparency. We work closely with our clients and their trusted advisors to determine the optimal solution based on their requirements: one which meets their needs and supports them in relation to services such as professional trusteeships, director services, administration and compliance services.

What have the challenges been in obtaining excellence?

In an increasingly volatile world and with the complexity of a constantly evolving legal and regulatory landscape, the need for experienced trustee and company administra-

tion service providers offering a bespoke, high quality service has grown exponentially.

The challenge is staying at the forefront of these changes. We are involved in a number of working parties across our locations to stay informed of industry and regulatory updates. This ensures that we have a robust set of policies and procedures that are able to evolve constantly to comply with changing local and global regulatory requirements.

Our team of highly experienced professionals is able to address this need by creating tailor made solutions to support the varied needs of private families and established family offices across the globe.

Whom do you look up to for inspiration and examples to emulate and compare yourself against, either inside or outside the wealth management industry?

We look to work with like-minded advisers who always put their clients first and work in a truly collaborative way. Working as part of such a team ensures our mutual clients obtain the best ongoing advice and support.

What do you hope will be the main consequence of achieving this accolade?

We hope that this award will raise our profile as we grow the business internationally. Giving recognition to the fantastic team we have at Crestbridge, and our shared team ethos to provide excellent client service.

How will you use the award to raise your profile in the industry and among clients?

We are a keen supporter of a number of initiatives, and this *WealthBriefing* award is a fantastic industry endorsement. ■

"WE ARE PRIVATELY-OWNED, AND TRULY **INDEPENDENT**, GIVING US THE FREEDOM TO TAILOR OUR SERVICES TO OUR CLIENTS' EXACT REQUIREMENTS. OUR INDEPENDENCE MEANS WE CAN **TAILOR** OUR SERVICES TO FIT OUR CLIENTS' NEEDS, BOTH NOW AND AS THEY EVOLVE, BUILDING LONG-TERM RELATIONSHIPS AROUND **EXCEPTIONAL** QUALITY OF SERVICE."



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AWARDS 2019



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GUERNSEY SET FOR GROWTH

Dominic Wheatley, Chief Executive of Guernsey Finance, outlines Guernsey's strengths and future aspirations to **Tom Burroughes** from *WealthBriefing*.

Guernsey has been active as a financial services centre in the Channel Islands for more than half a century.

Originally a hub for merchant banking from London and Europe in the 1960s and 70s, the island has diversified and now offers one of the broadest range of industry services for a specialist global centre, covering investment funds, private wealth, insurance and banking.

The island was proud to be named **Best International Finance Centre** at the *WealthBriefing* European Awards 2019.

Guernsey Finance is the promotional agency for the island's financial services industry.

What sets you apart from your peers this year?

Guernsey prides itself on innovation and being nimble in response to commercial, regulatory and political pressures. To be recognised as the best International Finance Centre demonstrates both the breadth and depth of Guernsey's offering, which includes private wealth, fiduciary services, banking, asset management, funds and insurance.

Guernsey's specialist finance sector plays an important role in the global economy, connecting investors and markets, facilitating capital flows and trade, and belying its physical size.

How have your colleagues contributed to the success of your organisation?

As the promotional agency for the financial services industry in Guernsey, Guernsey Finance has just 21 staff. But the wider industry directly employs nearly 7,000 people and contributes some 40% of the island's annual GDP. It is a bit of an awards ceremony cliché, but this award is for all of them.

At Guernsey Finance particularly our role is to promote and connect Guernsey as a leading finance centre in our chosen markets. We do that through all the traditional and social channels you might expect, plus a very busy events programme, where we concentrate

on core markets and sectors, both close to home and further afield, typically staging our own events rather than simply attending third party conferences and events. Our events are well respected and are delivered to a very high standard.

Our industry supports us strongly at these events and on roadshows to our overseas markets. One of Guernsey's real strengths is the close relationship between our industry, government and regulator, who all work together to keep our industry driving forward.

What will you do to keep the standard of an award-winner and push ahead in the future?

Last year Guernsey Finance, together with our government, the States of Guernsey, published a new policy framework to support the future growth of Guernsey's finance sector. It lays out a clear approach to positioning Guernsey, while looking to create growth in the sector and develop a sustainable, long-term future.

It set out an approach to create leadership for the island's finance sector, built on the island's well-known strengths and range of global specialisms. Our priorities are:

- Green and sustainable finance;
- Family office and private wealth services;
- Fintech, including the development of electronic AML and distributed ledger technology;
- Funds, focusing on the island's global distribution strengths and new product development;
- Wealth management, investment and brokerage services; and
- Family office and private wealth services.

What have the challenges been in obtaining excellence?

The global economy provides challenge and opportunity. Competition is fiercer, the regulatory environment tougher, and there are regular political headwinds to overcome. We are not complacent, because we know

that to remain successful, we must continue to create the best conditions for firms to succeed and to set out a clear strategy for future competitiveness.

We continue to prove our credentials as a responsible, global finance centre, time and time again, and possess an impeccable track record and commitment to transparency.

The path to the top is not necessarily a smooth one. We must continue to set ourselves aspirational goals and aim for excellence.

Whom do you look up to for inspiration and examples to emulate and compare yourself against, either inside or outside the wealth management industry?

Being from an insurance background, I would single out Steve Butterworth, a former insurance regulator in Guernsey, who demonstrated how innovation and drive, combined with consultation and cooperation with industry can build a world-beating offshore finance sector.

Guernsey has him to thank for our world-leading captive insurance industry, which has now successfully diversified into reinsurance, insurance-linked securities, specialist lines and managing general agents (MGAs).

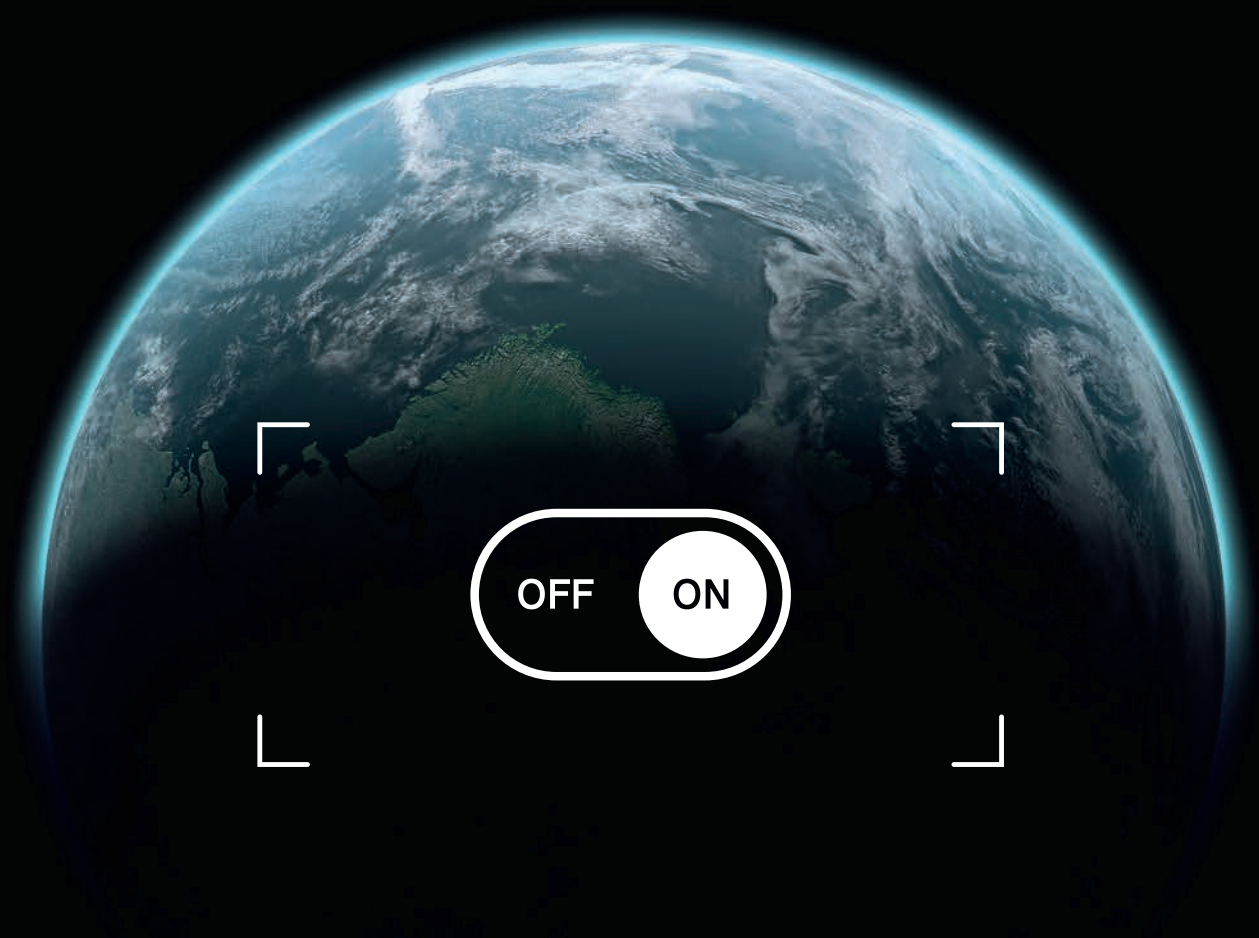
What do you hope will be the main consequence of achieving this accolade?

Many private wealth practitioners will know Guernsey well, and understand our strengths and what we can do for their clients. With our new focus on private wealth and family offices, and the recognition from *WealthBriefing*, we hope to build our standing in this sector and attract a wider audience.

How will you use the award to raise your profile in the industry and among clients?

In a highly competitive industry, you don't want to miss an opportunity to positively raise your profile. Guernsey has a lot to offer and is developing its products and services all the time. ■

"WE CONTINUE TO PROVE OUR CREDENTIALS AS A **RESPONSIBLE**, GLOBAL FINANCE CENTRE, TIME AND TIME AGAIN, AND POSSESS AN **IMPECCABLE** TRACK RECORD AND **COMMITMENT** TO TRANSPARENCY. THE PATH TO THE TOP IS NOT NECESSARILY A SMOOTH ONE. WE MUST CONTINUE TO SET OURSELVES **ASPIRATIONAL** GOALS AND AIM FOR **EXCELLENCE**."



A spiraling global population, social inequality and finite resources demand a new approach to investment. By switching to a more sustainable strategy, we believe financial models can secure future prosperity, both for investments and the planet.

Rethink sustainability at
LombardOdier.com

rethink everything.



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LOMBARD ODIER DARIER HENTSCH

PRIVATE CLIENTS
ASSET MANAGEMENT
TECHNOLOGY

A RESILIENT BUSINESS MODEL WINS REWARDS

Patrick Odier, Senior Managing Partner of Lombard Odier, talks to **Tom Burroughes** of *WealthBriefing* about why its sustainable business model succeeds.

What sets you apart from your peers this year?

We have continued to drive the industry towards a more sustainable model in 2019, by making a very public commitment to embed sustainability into all our investment processes and portfolios, across the group. For us, sustainable investing is not about products – it is a much broader investment philosophy – and it is our firm conviction that sustainable investments will generate higher returns mid-term.

Our own long-standing commitment to corporate responsibility was recognised in March, when we became the first global wealth and asset manager to receive B Corp certification. This is one of the world's most advanced corporate sustainability ratings. Becoming a "B Corp" involves a rigorous assessment of a company's environmental and social performance and governance. It measures how companies manage their people, environmental footprint, products, suppliers and the communities with whom they interact.

We also continue to pursue our strategy of targeted, organic growth, becoming the first Swiss private bank to open a branch in the prestigious Abu Dhabi Global Market financial centre in the same month. This new branch builds on more than half a century's commitment to clients in the Middle East, and an award-winning 12-year presence in the UAE.

How have your colleagues contributed to the success of your organisation

We believe in the importance of working together as a single Group, regardless of individual business lines. We concentrate on a single goal – serving our clients for the long term and behaving as responsible entrepreneurs. In our private client business, we continue to diversify our wealth planning and investment offerings in order to deliver differentiated solutions.

In our Asset Management Business (LOIM), the performance of our products is very strong – with nearly 80 per cent of our products in the first and second quarter over five years and 23 funds rated 4 or 5 stars by Morningstar, we perform well above our peers.

What will you do to keep to the standard of an award-winner and push ahead in the future?

We pride ourselves on delivering excellence for our clients, and have done since 1796. To do this, we are constantly rethinking the way we serve them, redesigning and improving our services, to suit an evolving world and a rapidly changing investment landscape.

We have several exciting projects ahead – this year we welcomed a new Managing Partner on board, Alexandre Zeller, one of the leading figures in Swiss banking, whose strategic vision, operational expertise and unparalleled network will help us drive the business forward.

We are working hard to strengthen relationships with our Next Generation of clients, and in May held a "Lombard Odier Generations Summit" for them during the Venice Biennale. It was themed around sustainability, with contributions from Nobel and Pritzker Prize winners, and entrepreneurs involved in urban design, vertical farming and reducing CO2 emissions.

Further ahead, we are looking forward to the completion of our new, sustainable, global headquarters "OneRoof" in 2022. This has been designed by world-leading architects Herzog & de Meuron to provide an outstanding client experience, and to bring all our Geneva-based employees under a single roof for the first time.

What have the challenges been in obtaining excellence?

This year we continue to invest in developing the business and in recruiting high-quality talent and are encouraged with the growth we have seen in 2019 to date.

What do you hope will be the main consequence of achieving this accolade?

Our *WealthBriefing* awards this year for **Best Private Bank - Investment Management Platform (UK & European)** and **Best Marketing/PR Campaign** have underscored our commitment to exceptional wealth management and long-term value creation. They inspire us to continually develop our expertise and services, and remind us that the industry never stands still. ■

"WE BELIEVE IN THE IMPORTANCE OF WORKING **TOGETHER** AS A SINGLE GROUP, REGARDLESS OF INDIVIDUAL BUSINESS LINES. WE CONCENTRATE ON A SINGLE GOAL – SERVING OUR CLIENTS FOR THE LONG TERM AND BEHAVING AS **RESPONSIBLE** ENTREPRENEURS. IN OUR PRIVATE CLIENT BUSINESS, WE CONTINUE TO **DIVERSIFY** OUR WEALTH PLANNING AND INVESTMENT OFFERINGS IN ORDER TO DELIVER **DIFFERENTIATED** SOLUTIONS."

First criminals exploit the elephants.
Then, the financial system.

Not good enough.

Every year, criminal syndicates kill 30,000 elephants because of the money to be made. Then they abuse the financial system to legitimise the proceeds. It's time for the financial sector to take a stand. See how we're working with partners to fight the money laundering that fuels the illegal wildlife trade at sc.com/hereforgood

Because we're not here for good enough.

We're Standard Chartered, and we're Here for good.



Here for good

STANDARD CHARTERED THE ENTREPRENEUR'S BANK

Steve Atkinson, Regional Head, Private Banking, Europe, Africa and Middle East, Standard Chartered talks to **Tom Burroughes** from *WealthBriefing* about the group's achievements.

What sets you apart from your peers this year?

Standard Chartered has a unique footprint across Asia, Africa and the Middle East that enables us to give clients access to the world's fastest growing markets and cross border business channels. As part of our 'One-Bank' proposition, clients can also access our Commercial Banking and Corporate & Institutional Banking capabilities to support their wider business needs. Our aspiration is to be the private bank for entrepreneurs and is built on Standard Chartered's inherent strengths: a heritage of more than 150 years in international banking, a global presence in more than 60 markets, and a strong understanding of growth markets. Our relationship managers, investment advisors and product specialists have a deep understanding of our local markets and client needs, enabling them to connect our clients to an extensive range of wealth opportunities across our network.

We are proud to win the award for **Best Private Bank – Talent Management and Diversity** as it reflects our unique footprint and the talent coming from our diverse markets, and is testament to our purpose of driving commerce and prosperity through our unique diversity.

What will you do to keep to the standard of an award-winner and push ahead in the future?

Our transformation journey began two years ago with a commitment to grow and innovate, including USD250m investment to upgrade our underlying technology and core banking platform, and increase the number of senior Relationship Managers (RMs). We have more than doubled the number of senior RMs since 2016.

We hire from a variety of sources, both in the UK and from across our footprint, ensuring we have a diverse team to meet the varying and diverse needs of our clients. We have had tremendous success in talent acquisition, attracting 60 senior RMs globally in 2017 and this year added 14 new hires to our Middle East & North Africa (MENA) team. We are seeing real momentum and will continue to build on this to ensure we have the best team to serve our clients.

We will continue to invest in our people, our learning programmes and the Private Bank Academy to ensure that our talent can grow with us. The Academy aims to challenge thinking and build skills at each level, and passing the certification programme requires both preparation and dedication. We will maintain these high standards to upskill our people to serve clients better as well as provide them development opportunities within the Bank. The Academy places strong focus on diversity, with workshops that bring together different roles to create a 'one team' focus on the client, leveraging the skills of Relationship Managers, Investment Advisors and other Product Specialists.

With our exclusive INSEAD programme, we target a 50:50 male:female representation from various levels of experience, backgrounds and geographies to bring together diversity of perspectives. These programmes have enhanced our ability to attract talent and is one of the contributing factors to our growth in AUM.

How have your colleagues contributed to the success of your organisation?

Our people and their diversity are the soul of the business. When I look at our teams, I'm amazed at the number of nationalities and languages spoken, a good mix of gender, age groups and backgrounds – I believe this diversity helps us work more effectively and ultimately serve our clients better. New joiners always remark on how friendly and welcoming we are, from the moment they are greeted by our reception team.

Our people have years of experience, local knowledge coupled with global insights from our advisory committee and research team, client-centric ethos and real cross-border teamwork. Be they client-facing, middle office or back office, they play a key role in the success of the Bank and this award is a tribute to all of them.

Whom do you look up to for inspiration and examples to emulate and compare yourself against, either inside or outside the wealth management industry?

Industry awards such as these allow us to benchmark and learn from others. The Bank

has a strong focus on culture and looks to instil positive behaviours every day in the way we manage our business.

We have a global team of around 1,000 employees in the Private Bank spread across our diverse footprint.

We challenge our business leaders daily to identify their own development areas and to heighten and celebrate their strengths to achieve and inspire excellence.

We learn from each other, from colleagues in other markets and businesses as we value the diversity of perspectives that each brings.

What do you hope will be the main consequence of achieving this accolade?

Winning the award for Best Private Bank – Talent Management and Diversity means a lot to us; it is a recognition of the value that our diversity brings and a further sign that we are heading in the right direction in our talent management and people development programmes.

This makes people proud to work for Standard Chartered, it motivates our teams and helps ensure we uphold the excellent culture that we have.

The award recognises the success we have achieved in our business and in our people, and will continue to inspire us to never settle, do the right thing and be better together.

How will you use the award to raise your profile in the industry and among clients?

We hope that this accolade will amplify our brand promise as well as our ability to attract the best talent.

Besides the Private Bank Academy and our INSEAD programme, as an employer Standard Chartered has launched many initiatives such as flexible working, parental leave, Fair Pay Charter and a Diversity & Inclusion Policy. Our commitment is to create a safe, supportive and empowering environment where everyone is treated with dignity and respect.

We hope we are setting a positive standard for other organisations, and that our clients see the value we place on our people and culture. ■



THE WEALTHBRIEFING EUROPEAN AWARDS WINNERS 2019

WINNERS: PRIVATE CLIENT CATEGORIES

PRIVATE CLIENT LAW FIRM

**STEPHENSON
HARWOOD**



INDEPENDENT TRUST OR FIDUCIARY COMPANY

 **CRESTBRIDGE**



OFFSHORE LAW FIRM

Ogier



INSTITUTIONAL TRUST OR FIDUCIARY COMPANY

 **NORTHERN
TRUST**



PRIVATE CLIENT LAWYER

NICK WARR

TaylorWessing



ESTATE PLANNING

 **ABN-AMRO** Private Banking



FAMILY LAW LEGAL TEAM

MANDERS
FAMILY LAW SPECIALISTS



MANAGEMENT CONSULTANCY

 **EY** Building a better
working world



PENSIONS ADVISOR OF THE YEAR

 **Sanlam**



WINNERS: WEALTH MANAGEMENT TECHNOLOGY CATEGORIES (*in-house solutions only*)

INNOVATIVE CLIENT SOLUTION


netwealth



CHANGE MANAGEMENT PROCESS/ BEST IMPLEMENTATION OF A TECHNOLOGY SOLUTION

 **Heartwood**
Investment Management



GLOBAL AWARDS

Showcasing the best in the industry

*Independence,
integrity and
genuine insight
are the
watchwords
of the judging
process*



2019/2020 SCHEDULE

NOVEMBER 2019

WealthBriefing MENA Awards

FEBRUARY 2020

WealthBriefing Swiss Awards

FEBRUARY 2020

WealthBriefingAsia Greater China Awards

MARCH 2020

Family Wealth Report Awards

APRIL 2020

WealthBriefing European Awards

MAY 2020

WealthBriefingAsia Awards

 **WealthBriefing** MENA
AWARDS 2019

 **FAMILY**
WEALTHREPORT NEW YORK
AWARDS 2020

 **WealthBriefing** SWISS
AWARDS 2020

 **WealthBriefingAsia**
AWARDS 2020

 **WealthBriefing** EUROPEAN
AWARDS 2020

 **WealthBriefingAsia** GREATER CHINA
AWARDS 2020

For more information: + 44 (0) 20 7148 0188 (UK office)

www.wealthbriefing.com / www.wealthbriefingasia.com / www.fwreport.com

WINNERS: WEALTH MANAGEMENT TECHNOLOGY CATEGORIES (open to technology vendors only)

FRONT OFFICE SOLUTION

e>OOQ



DATA PROVIDER



TRANSACTION PROCESSING SOLUTION

essential for banking



CLIENT ACCOUNTING

WE GO BEYOND THE NUMBERS



PORTFOLIO MANAGEMENT

Mastering Complexity



RISK PROFILING SOLUTION

BETTER INTELLIGENCE THROUGH ANALYSIS



CLIENT COMMUNICATIONS

Software Solutions for
Wealth & Asset Management



RISK MANAGEMENT

Mastering Complexity



CLIENT REPORTING



ON-BOARDING



COMPLIANCE



INNOVATIVE CLIENT SOLUTION



CRM SYSTEM

WEALTH DYNAMIX



INNOVATIVE FINTECH SOLUTION



OUTSOURCING SOLUTION



CHANGE MANAGEMENT PROCESS/ BEST IMPLEMENTATION OF A TECHNOLOGY SOLUTION

BETTER INTELLIGENCE THROUGH ANALYSIS





WINNERS: LEADERSHIP CATEGORIES

OUTSTANDING CONTRIBUTION TO WEALTH
MANAGEMENT THOUGHT LEADERSHIP (COMPANY)

Tribe **A NEW
WEALTH
ORDER**



LEADING INDIVIDUAL (ADVISOR)

ROSS ELDER



Lincoln Private
Investment Office
London

OUTSTANDING CONTRIBUTION TO WEALTH
MANAGEMENT THOUGHT LEADERSHIP (INDIVIDUAL)

JAMES QUARMBY

**STEPHENSON
HARWOOD**



LEADING INDIVIDUAL (BANKER)

THEOPHANIS THEOPHANOUS



WINNERS: EUROPEAN PRIVATE BANKING CATEGORIES

PRIVATE BANK - BEST CREDIT PR OVIDER



SOCIÉTÉ GÉNÉRALE
Private Banking



UHNW TEAM

J.P.Morgan



BEST PRIVATE BANK - TALENT MANAGEMENT

Julius Bär



INTERNATIONAL CLIENTS TEAM

SYZ BANQUE
PRIVÉE

BEST PRIVATE BANK - INVESTMENT MANAGEMENT
PLATFORM

LOMBARD ODIER
LOMBARD ODIER DARIER HENTSCH



DOMESTIC CLIENTS TEAM

Nykredit
private banking



BEST PRIVATE BANK - CLIENT SERVICE

REYL



OVERALL EUROPEAN PRIVATE BANK



BNP PARIBAS
WEALTH MANAGEMENT



WINNERS: INVESTMENT MANAGEMENT CATEGORIES

SPECIALIST WEALTH MANAGER

bordier | 1844



INVESTMENT PRODUCT PROVIDER

ACPI
INVESTMENT MANAGERS



SPECIALIST INVESTMENT MANAGER

Julius Bär



ALTERNATIVE INVESTMENT MANAGER


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Gresham House
Specialist asset management



PRIVATE INVESTMENT OFFICE

**CAPITAL
GENERATION
PARTNERS**



EXTERNAL ASSET MANAGEMENT PLATFORM AND OFFERING

Julius Bär



MULTI-FAMILY OFFICE


**STONEHAGE
FLEMING**



PLATFORM PROVIDER


investcloud



FUND MANAGER

 **Heartwood**
Investment Management



ETF PROVIDER


WISDOMTREE
EUROPE



WINNERS: SPECIAL WEALTH MANAGEMENT CATEGORIES

CYBER SECURITY

WealthBriefing EUROPEAN
AWARDS 2019

WEALTH PLANNING TEAM

WealthBriefing EUROPEAN
AWARDS 2019

CORPORATE SOCIAL RESPONSIBILITY/ DIVERSITY

WealthBriefing EUROPEAN
AWARDS 2019

PHILANTHROPY OFFERING/INITIATIVE OF THE YEAR

WealthBriefing EUROPEAN
AWARDS 2019

INTERNATIONAL FINANCE CENTRE

WealthBriefing EUROPEAN
AWARDS 2019

MOST PROMISING NEW ENTRANT/OFFERING

WealthBriefing EUROPEAN
AWARDS 2019

GLOBAL CUSTODIAN TO PRIVATE CLIENT BUSINESSES

WealthBriefing EUROPEAN
AWARDS 2019

MOST INNOVATIVE WEALTH MANAGEMENT MODEL

WealthBriefing EUROPEAN
AWARDS 2019

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Family Wealth Report - the content as with our other sites comes from both our own dedicated editorial team as well as leading industry professionals, helping subscribers stay on top of all the important developments relating to wealth management, family offices, and the HNW/UHNW sectors in North America.

www.fwreport.com

Compliance**matters**

Compliance Matters is the key source of international news and analysis on the latest regulatory initiatives within the private banking and wealth management industry. *Compliance Matters* provides readers with exclusive access to expert analysis and advice on how best to operate a business within the legal bounds.

www.comp-matters.com

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Offshore Red is the key monthly source of news and analysis relating to international tax, trust and regulatory developments, with unique access to a highly-qualified group of experts specialising in tax planning, legal and financial services.

www.os-red.com

WEALTH MANAGEMENT & PRIVATE CLIENT EVENTS & AWARDS SERIES

An unrivalled thought-leadership platform, *WealthBriefing's* events foster intellectual debate on the challenges and opportunities facing the industry and are designed to be an optimal use of wealth managers' precious time; they represent an excellent networking opportunity and attendees also accrue valuable CPD hours. *WealthBriefing* has added to its offering for the global private banking and wealth management communities by running six annual awards programmes for the private investment and private client communities. The awards programmes are focused around three main category groupings: experts (individuals and teams); products and services for wealth managers and clients, and institutions of all sizes and types.

BESPOKE RESEARCH SERVICES

WealthBriefing has unrivalled access to the most senior wealth management professionals across the globe, meaning that our research reports represent guides to future best practice as much as being barometers of current industry trends.

WINNERS: UK PRIVATE BANKING CATEGORIES

PRIVATE BANK CUSTOMER FACING DIGITAL CAPABILITIES

Citigold
Wealth Management



UHNW TEAM

 **HSBC**
Private Banking



PRIVATE BANK - BEST CREDIT PROVIDER

BROWN SHIPLEY



HNW TEAM

Citigold
Wealth Management



BEST PRIVATE BANK - TALENT MANAGEMENT AND DIVERSITY

Standard Chartered
Private Bank 



INTERNATIONAL CLIENTS TEAM

Citigold
Wealth Management



BEST PRIVATE BANK - INVESTMENT MANAGEMENT PLATFORM

17  96

LOMBARD ODIER
LOMBARD ODIER DARIER HENTSCH



DOMESTIC CLIENTS TEAM

 **HSBC**
Private Banking



CHARITY TEAM



WAVERTON
INVESTMENT MANAGEMENT



OVERALL UK PRIVATE BANK

 **HSBC**
Private Banking



WEALTH PLANNING TEAM

 **Sanlam**



WINNER: MARKETING / PR CATEGORY

BEST MARKETING OR PR CAMPAIGN

17  96

LOMBARD ODIER
LOMBARD ODIER DARIER HENTSCH



ATTENDEE LIST

The *WealthBriefing* European Awards 2019

A

AAAccell
ABN AMRO Private Banking
Accuro
ACPI Investments - UBP
Action Tutoring
Altus
AM-One
Andersen Tax
Appway
Assured Thought
ATEB suitability
Avaloq
Avignon Capital

B

Bank of London and The Middle East (BLME)
Barclays Private Bank
BDO
Bedrock Group
Belgravia Therapy
Bethmannbank Germany
BITA Risk
BITA Risk
BNP Paribas
BNY Mellon
BNY Mellon | Pershing
Bolt Markets
Bordier UK
Brewin
Brown Shipley
Butterfield Bank (Guernsey)
Butterfield Mortgages

C

C Hoare & Co
Capital Generation Partners
CAPITALIUM ADVISORS
Catalyst
Chancery Court Tax Chambers
Charlie Allen Bespoke Tailors
Chase de Vere
Cheeswrights
Citi Private Bank
Citigold Wealth Management
Cognizant
Compeer
Coombe Advisors
Coutts
Credo
Credo Wealth
Crestbridge
CUBE

D

Deutsche Bank Wealth Management
Dorsum
Druces
DWS

E

Edgelab
Electra
ERI Banking Software
Esteria
Evoq
Expersoft Systems
EY

F

FactSet
Fairway Group
Fenergo
Fiduchi
Finantix
Forte Financial
Frank Hirth
FundCount

G

Global Resource Solutions
Gresham House
Guernsey Finance

H

Hassium
Heartwood Investment Management
Highworth Research
HSBC Private Banking

I

IAWMC
Intertrust
InvestCloud

J

Jefferies
Jersey Finance
JP Morgan Private Bank
JTC
Julius Baer

K

Kempen
Killik
Kleinwort Hambros

L

Langcat Financial
LGT
Lincoln Private Investment Office
Lloyds Banking Group
Lombard Odier
London City Group
Lyxor ETF

M

Manders Law
Mastro
McDermott Will & Emery
Mediacom
Mediolanum International Funds
MilleniumAssociates
Mulberry Bow
Multrees

N

Netwealth
New Street Management
Newgate Communications
Northern Trust
Novastone
Nykredit Private Banking Elite

O

Objectway
Ogier
1 Hare Court Chambers
Orbium, an Accenture Company
Oxford Risk

P

Pinsent Masons
ProFundCom

R

Rathbones
RBC
REYL & Cie
Roland Berger
Royds Withy King
Ruffer

S

Saltus
Sanlam
Sarasin
Schroder & Co Bank Switzerland
Scorpio Partnership
Shard Capital
Signia Wealth

SimCorp Coric
smartKYC
Smith and Williamson
SPV Consultants
SS&C
SS&C Advent
Standard Bank
Standard Chartered Private Bank
Stephenson Harwood
Stonehage Fleming
Strabens Hall
swissQuant Group
Synpulse
SYZ Private Banking

T

TAM Asset Management
Taylor Wessing
TechRules
Tiller Investments
Tindoco
Triangle Investments and Development
Tribe Impact Capital

U

Union Bancaire Privée

V

VTFinTech

W

Waverton Investment Management
Wealth Dynamix
Wealth Mosaic
WealthObjects
Wedlake Bell
Westleton Drake
WisdomTree Europe

Y

Y&R

Z

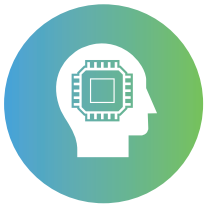
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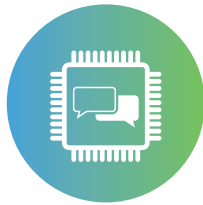
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