

ACCLAIM

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

EXCLUSIVE
THE WEALTHBRIEFINGASIA
2017 AWARDS WINNERS

August 2017

THANK YOU

OUR THANKS GO TO THE FOLLOWING FOR ALL THEIR HELP AND GENEROUS SUPPORT
IN MAKING OUR *WEALTHBRIEFINGASIA* AWARDS OF 2017 A HUGE SUCCESS



Huddlestone Jones



Intertrust



ProFundCom
trusted digital marketing for finance



The smartest way to know your customer



UBS



UOB 大华银行
PRIVATE BANK



CONTENTS

WEALTHBRIEFINGASIA AWARDS JUDGING PANEL	4
INTERVIEWS:	
Oclaner	9
SS&C Advent	11
SS&C Technologies	13
WEALTHBRIEFINGASIA AWARDS WINNERS IN FULL	14
WEALTHBRIEFINGASIA AWARDS ATTENDEE LIST	19

FOREWORD

Tom Burroughes, Group Editor, *WealthBriefingAsia*

The *WealthBriefingAsia* awards remind the industry that it is, to use that cliché, a people business because it is only delivers if the people who work in it are committed to excellence. And those who win these awards, or are shortlisted, have certainly proven a point. When there is talk about client service and the need to keep up with latest trends, these awards give tangible evidence of who has lived up to expectations and gone beyond them.

The awards revolve around the judging process, which comprises a rigorous process designed to blend the views of a range of industry figures and experts. Judges include bankers, tax experts, lawyers, consultants, and technologists.

When deciding on a shortlist and the eventual winners, judges put most weight on the quality of the entrant's written submissions, although they also give weight to what they know about the entrants. Judges are divided into groups so they do not judge firms/persons in their own immediate business segment so as to avoid conflicts of interest and access to commercially sensitive information. Just as importantly, judges review the awards categories at the end of each awards programme to see if certain segments should be changed, removed or added to keep up with alterations to the structure of the industry. These awards absolutely depend on the willingness of people to offer views and advice. The organisers of these awards are particularly grateful to the judges for the time and diligence they devote. Readers can check the list of judges by going to the *WealthBriefingAsia* website.

Not only are the awards a great reason for a good evening of entertainment and conviviality, they are also a great accolade, so it is not surprise that those who are shortlisted and win are happy to mention these awards in their publicity material. To be named a winner of these awards is concrete proof that a message about the importance of quality and client service is reality. At a time when the wealth management sector wrestles with many challenges, that's a message worth shouting about.



OVERVIEW OF THE ASIAN WEALTH MANAGEMENT SECTOR

For some time Asia is the region setting the hottest pace in growth in value and numbers of high net worth and ultra-high net worth individuals, and latest data shows no real sign of that trend changing. According to the 2016 World Wealth Report of Capgemini, issued in 2016, Asia-Pacific recorded robust HNW individual population and wealth growth rates (9.4 per cent and 9.9 per cent, respectively - highest across the globe, and edged past North America to become the region with the highest HNW individual wealth of \$ 17.4 trillion. The rise of an Asian middle class is well chronicled; there are also signs of some maturation, with more talk about the need to handle intergenerational wealth transfer and move away from a transactional approach to wealth management towards a more discretionary, and advisory one.

The rising tide of Asian private wealth hasn't

always lifted all the boats, however. The past few years have seen banks such as ABN AMRO, ANZ, Barclays and Societe Generale pull out from private banking in Asia, selling to local players such as DBS and OCBC. To some extent the pull-out of some foreign players is because the costs of doing business in Asia turned out to be higher than they had hoped, given their inability to generate sufficient business volumes to justify the expense. The trend also shows that domestic players such as DBS and OCBC in Singapore, for example, are tightening their grip on some of the home market. But foreign-headquartered banks are by no means out of the running: UBS, Credit Suisse, Julius Baer, JP Morgan and Citigroup, for example, are prominent. HSBC and Standard Chartered, while dual-listed, are hybrids of a sort – both local in many ways, but with an international reach.

Another trend has been how Asia is often seen as the place to launch snazzy news ideas around fintech; Hong Kong and Singapore have been keen to put themselves forward as hubs for firms trying to disrupt traditional business models. Asia also sees the impact of China's opening up of its capital markets, such as through various links to trade mainland bonds and equities. And let's not forget that Malaysia, Indonesia, Thailand, Vietnam, South Korea and Japan are important markets, although in the case of Japan, it remains dominated by domestic firms. And this publication notes that the Philippines, for example, is drawing more attention. This is a vastly complex and dynamic region. Last but not least, Australia and New Zealand, both of which are more developed as markets, remain significant and home to important firms such as ANZ, Macquarie and NAB.

JUDGING PANEL

The 2017 *WealthBriefingAsia* 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 Asian 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.



WILLIAM AHERN
Principal
Ahern Lawyers & Family Capital
Conservation



EVARD BORDIER
Chief Executive Officer
Bordier & Cie, Singapore



ARJAN DE BOER
*Head of Markets & Investment
Solutions, Asia*
Indosuez Wealth Management



PIERRE BAER
Chief Executive Officer
IBBM



SUSAN COLLINS
Consultant
Stephenson Harwood



CHRISTIAAN DE BRUYN
Director of Trust Services
Trident Trust Hong Kong



DR. MARIO A. BASSI
Senior Advisor
Private Wealth Network



JAMES COX
*Executive Director and Chief Executive
Officer*
British and Malayan Trustees



HANS DIEDERER
Head, Family Office Services
Heritage Trust Group

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.



ROLF GERBER

*Member of the Board of Directors
LGT Bank (Singapore)*



MARCUS HINKLEY

*Special Counsel
Withers KhattarWong*



MIMI HUTTON

*Of Counsel
Withers*



RICHARD GRASBY

*Partner
Charles Russell Speechlys*



JONATHAN HOLLANDS

*Managing Director
Carraway Group*



ROB IOANNOU

*Managing Director, Head of International
DBS Private Bank*



CHRISTIAN HEINEN

*Managing Director, Greater China
Intertrust*



ANTOINETTE HOON

*Partner
PwC*



RANJIT KHANNA

*Head of South Asia
Union Bancaire Privée*

**KWONG KIN-MUN**

*Head of Wealth Management Coverage,
Southeast Asia*
Deutsche Bank Wealth Management

**JACQUELINE LOH**

*Senior Vice, President, Head of Philanthropy
Services, North Asia, Private Wealth Solutions*
HSBC Private Bank

**MICHAEL OLESNICKY**

Special Advisor
KPMG

**PROFESSOR FRANCIS KOH**

Vice-Provost (Special Projects)
Singapore Management University

**PHILIP MARCOVICI**

Offices of Philip Marcovici

**ONG YENG FANG**

Managing Director
UOB Private Bank

**JEROEN KWIST**

Head of International Wealth Management
BNY Mellon Wealth Management

**PHILIPPE A MAY**

Managing Director
Arton Capital

**PATRYCJA OSELKOWSKA**

Executive Director
EY

**PHILIPPE LEGRAND**

Chief Executive Officer
London & Capital, Asia

**SIMON NG**

*Managing Director, Private Banking,
North Asia & Wealth Solution, Asia*
BMO (Bank of Montreal) Private Bank

**BRITTA PFISTER**

Managing Director
Rothschild Trust Asia Pacific



IAN POLLOCK
Regional Head of Private Bank
International, North Asia
ABN AMRO Private Banking



MICHEL VAN SELM
Director
PwC Consulting Singapore



VICKY WONG
Managing Director and Head of Key
Client Solutions
LGT Bank (Hong Kong)



BERNARD RENNELL
Senior Adviser to the CEO, Key Client
Coverage and Global Head
HSBC Private Bank



BRUCE WEATHERILL
Chief Executive
Weatherill Consulting



BASSAM SALEM
Region Head, Asia Pacific
Citi Private Bank



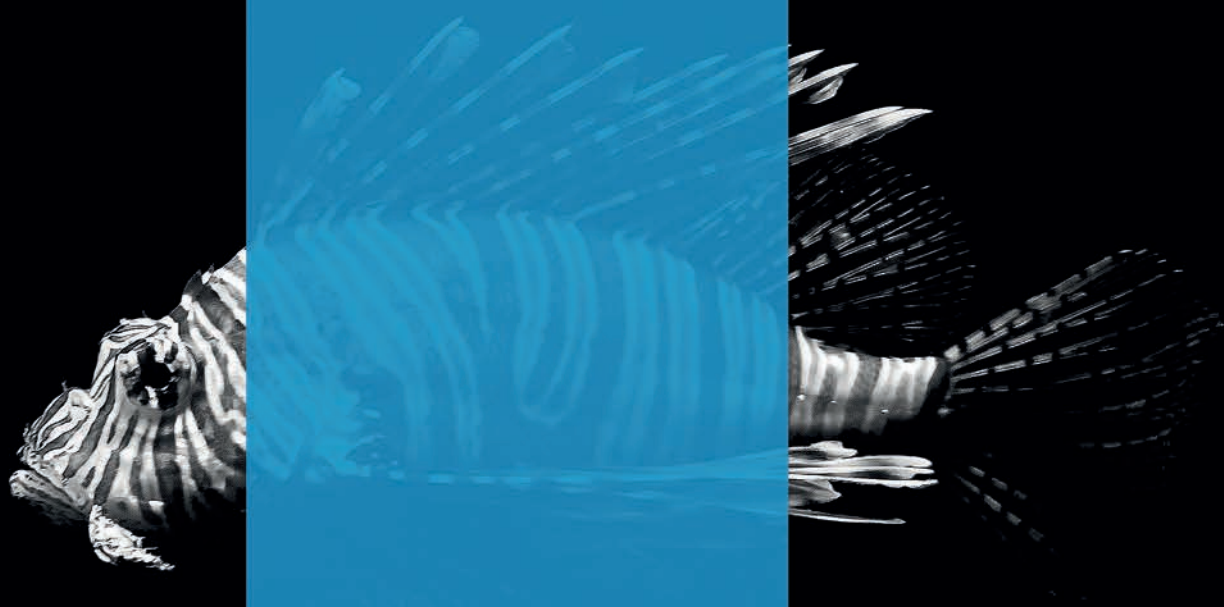
RICHARD WEISMAN
Senior Tax Partner (Hong Kong)
Baker & McKenzie



STEVEN SEOW
Head of Wealth Management, Asia
Mercer



ANTON WONG
Managing Director, Head of Key Client Group
BNP Paribas Wealth Management,
Asia Pacific



WE AIM FOR MORE

In 2016 the Oclaner Asian Bond Fund returned 11.3% with a volatility of 2.3%.¹

We strive to generate consistent risk-adjusted returns for investors. All our funds are managed with Oclaner signature: an active, flexible and conservative approach to investing.

For more information visit
www.oclaner.com

¹ annualized volatility of daily returns

*For information purposes only, this document does not constitute an offer to sell nor solicitation of an offer to buy an interest in Oclaner Funds. Past performance is not a guide or reliable indicator of future performance and no guarantee is being made that similar returns will be achieved in future. For further information, please contact Oclaner AM.

DELIVERING SOLID RESULTS IN VOLATILE TIMES

Ivo Bartoletti, Chairman & Chief Executive Officer talks to Tom Burroughes from *WealthBriefingAsia* on the importance of mitigating downside risk.

Oclaner is an asset management company based in Singapore. We provide independent solutions to High-Net-Worth individuals, families and institutions. Our services include thematic funds (UCITS V compliant), managed accounts and bespoke fund creation.

One of our core strengths lies in the Asian fixed income space. Over the years we have consistently generated superior risk-adjusted returns for our clients. Our flagship fund, the Oclaner Asian Bond Fund, was presented to *WealthBriefingAsia*'s jurors and was the main reason we won the *Fund Manager of the Year* award 2017.

We are delighted to have our work recognized by the jurors. This award is a testament to the fantastic work of the Oclaner team.

How did you stand out from other fund managers in the eye of the jurors?

First of all, we submitted real evidence about our fund's performance and risk profile, including audited data and comparative analysis from independent third parties.

During a volatile 2016, the Oclaner Asian Bond Fund returned +11.3 per cent net of fees to its investors. These returns placed the Oclaner Asian Bond Fund in the top 10 per cent of its peer group. In addition to delivering on performance, the fund has displayed a low risk profile. In fact, we successfully maintained a 2.3% volatility and kept the maximum draw-down at 1.45 per cent over the year. Looking back at the fund's performance since inception in mid-2012, we generated a net return of +27.7 per cent for our investors.

In terms of protection and compliance, our investors not only benefit from the strong regulatory framework of UCITS and Commission de Surveillance du Secteur Financier (CSSF) in Luxembourg but also from the Monetary Authority of Singapore (MAS). Our funds comply with the toughest regime in term of portfolio management and risk discipline ensuring transparency, liquidity and safe-keeping of

assets. Last but not least, the jurors commended the quality of our people. In fact, Oclaner's investment team has the expertise and track record necessary to succeed in this competitive environment.

For instance, Oclaner Asian Bond Fund's lead fund manager, Olivier Spoor, has extensive experience in the Asian fixed income industry, having worked at Kamunting Street Capital, an Asian credit hedge fund as well as at Exane Derivatives prior to joining Oclaner in 2014.

What is the fund's strategy and what are the performance drivers?

The Oclaner Asian Bond Fund is an absolute return fixed income fund which invest predominantly in the Asia ex Japan region. The fund aims at generating superior risk-adjusted returns over the medium term.

We practice unconstrained portfolio management. This means that we allow our fund managers to express real convictions and manage the portfolio with a medium to long term view. We have the ability to position our fund flexibly across both credit risk and interest rate risk, meaning that we can rebalance our fund to benefit from different market environments.

At Oclaner we believe that managing a bond fund is about mitigating downside risks rather than chasing yield at all costs. Therefore, we conduct in-depth fundamental analysis on the companies we invest in and regularly meet with their Chief Financial Officers (CFO) to stay on top of recent corporate activities. We only invest in those bonds that we believe adequately compensate us for the risks involved.

Finding the right fit is a constant challenge and we have developed a deep knowledge of the Asian debt market over the years. To mitigate downside risk, the fund always remains well diversified not only across countries and sectors, but also across the capital structure with a blend of investment grade and high yield (including convertible bonds).

Benchmarked and large Asian bond funds are likely to provide disappointing returns as they deploy capital in large issues and not necessarily in the most attractive risk-reward opportunities. Our size means that we are nimble and can take advantage of any market opportunity, even with tactical investments in small issues, and we can sell out positions easily with less risk and less large-scale impact.

What additional services does Oclaner offer to ultra-high net worth individuals and institutions?

Our core business is asset management. Our absolute priority is to protect and grow our clients' wealth and deliver consistent risk-adjusted returns. Clients can invest in our funds or can opt to have their own managed account or single-investor fund. Subject to minimum asset size requirements, we are able to run a comprehensive range of fixed income and equity strategies. Typically, our clients interested in having exposure to fixed income will request us to create and manage a bespoke bond portfolio which may include some degree of leverage if market conditions permit.

On the other hand, clients who wish to have an exposure to both the bond and equity markets will oftentimes solicit us to run a balanced mandate. In all these cases, we strive to keep costs to a minimum in order to maximize net investment performance.

What does receiving this award mean to you and your clients?

For investors, it is important to have fund managers like us validated and recognized by independent members of the investment community. We believe this award gives us the visibility amongst the Asian wealth management community.

Ultimately it also is an honor to be recognized for something in which we put much work, passion and dedication. ■

"WE PRACTICE **UNCONSTRAINED** PORTFOLIO MANAGEMENT. THIS MEANS THAT WE ALLOW OUR FUND MANAGERS TO **EXPRESS** REAL CONVICTIONS AND **MANAGE** THE PORTFOLIO WITH A MEDIUM TO LONG TERM VIEW."



Best Front Office Solution

Thank you WealthBriefing Asia for naming
SS&C Advent as Best Front Office Solution.

SS&C Advent solutions provide a centralized platform for making and executing trading decisions quickly and confidently and tracking them all the way through settlement. You can run them on-premise or in the cloud, with or without outsourced operational support.



advent.com

A LARGE OFFERING THAT HELPS WEALTH MANAGERS STAY NIMBLE

Mats Berggren, VP EMEA and APAC, SS&C Advent, talks to **Tom Burroughes**, editor of *WealthBriefingAsia* on how relentless focus on quality keeps it ahead.

SSS&C Advent, a division of SS&C Technologies (SSNC: NASDAQ), helps more than 4,300 investment firms in over 50 countries to grow their business and thrive. Our portfolio of software and rapidly deployable software-enabled services enable clients to automate and integrate mission-critical front-, middle- and back-office functions, spanning trading and modelling; portfolio management and reporting; as well as accounting, performance measurement and reconciliations.

By leveraging SS&C Advent's solutions, clients can focus on core operations, better monitor and manage investment performance and risk, improve operating efficiencies, accelerate decision-making and reduce operating costs.

SS&C Advent is global with offices in Asia-Pacific (Hong Kong, Beijing, Singapore); Europe, Middle East & Africa (London, Zurich, Stockholm, Oslo, Copenhagen, Dubai, Johannesburg); and North America (San Francisco, New York, Boston, Jacksonville). SS&C Advent won the award for *Best Front Office Solution* at the *WealthBriefingAsia* Awards.

What is your firm's extra factor that explains why you won this award?

SS&C Advent's integrated, end-to-end solutions provide wealth managers with all the functionality, scalability and efficiencies they need to compete in an increasingly complex and rapidly-evolving environment.

With its seamless workflow, our Moxy® trade order management module streamlines all aspects of the investment management process, from portfolio modelling and construction through trade creation, execution, confirmation, allocation and settlement. Moxy® enables portfolio managers and traders to move quickly in today's demanding marketplace.

Moxy integrates seamlessly with SS&C Advent's leading portfolio management module, Advent Portfolio Exchange® (APX). APX is a highly-scalable solution that combines portfolio management and custodial data, client relationship management and client reporting on a single platform. Besides providing firms with a lower TCO, relationship managers using APX can vastly improve their ability to service clients by quickly, easily and accurately accessing everything from detailed contact information to portfolio, transaction and performance data.

What specific qualities do your colleagues have that helped you to win?

One of the factors that sets SS&C Advent apart is our combination of extensive global reach and local expertise. Our dedicated APAC teams

in Singapore, Hong Kong and Beijing are composed of seasoned professionals with a wealth of experience in technology implementations and management, along with front-line knowledge of local regulations, industry practices and evolving market trends.

By keeping their finger on the pulse of regional developments and our clients' evolving requirements, our local teams are able to provide clients with the exceptional service and support for which SS&C Advent has become known around the world.

Explain how you intend to stay out front of the competition.

A key ongoing practice that enables SS&C Advent to maintain our industry-leading position is to involve clients in the feature validation process through our online SS&C Advent Client Community. The Community gives clients the opportunity to engage directly with us, and unlocks the power of SS&C Advent's valuable ecosystem of clients, partners, employees and experts in support of our extensive and continuous program of R&D investment.

For example, in 2016 the Product Idea Exchange resulted in the delivery of around 20 updates over the course of two releases, with more in production and a vibrant Community-sourced list of additional ideas in the pipeline.

What obstacles has your firm had to overcome to be an award-winner?

Technology, regulations, market practices, investment strategies and client expectations are all constantly evolving. Therefore, it is vital we continue to innovate in order to stay at the cutting edge and remain a competitive force in the industry. With such diversity in local market requirements, a key challenge is to ensure our products and services have the flexibility and specialization to cope with all these different market flavors.

Bringing together our world-class technology development capabilities with extensive on-the-ground knowledge helps us overcome this challenge and incorporate the necessary regional specificities into our solutions.

Explain areas where you are pushing forward, such as new products and services.

We are constantly developing and enhancing our Wealth Management Solution suite. For instance, we recently expanded the accounting and performance functionality in APX with additional data management and information

tracking capabilities. We also introduced enhancements for private equity that enable clients to create capital call transactions automatically, and exclude private equity from performance reports.

We have rolled out new "look-through" exposure reporting to address regulatory requirements, plus an expanded library of new and enhanced SSRS reports, including composite management, exposure detail and performance history detail.

Optimized CRM workflows and additional data views enhance the user experience by allowing more efficient access to critical portfolio, contact and security reference information. We have also introduced additional APIs and MS Office compatibility enhancements. In addition, we continue to expand our custodial network, with clients able to access new off-the-shelf links to add to the 850 links that already exist.

In Moxy, we have invested in a new UI to provide a more modern user experience and improve workflow efficiencies. We are also investing heavily in further enhancements to our already strong pre- and post-trade connectivity, as well as ensuring we adhere to new regulatory initiatives, such as MiFID II.

What and who are your role models?

Our clients are our true inspiration. By listening to and working closely with clients, we can better understand their needs and how best to fulfil them. Partnership is the key to mutual success.

What will this award do for your business?

This award is recognition of the many years and huge investment we have devoted, and continue to devote, to developing the best possible front office solutions for the investment management community.

In winning the award, we hope it will give extra validation to what we and our clients have long known - that a sophisticated and flexible front office solution is vital to the success of wealth management organizations around the world, and that we have the tools to help firms achieve the success and growth they want.

How does the award help you to spread the message about what you do?

We hope the award will enhance awareness in APAC and further afield of our Wealth Management Solution's industry-leading capabilities, and build on SS&C Advent's strong and growing reputation in the region. ■



Best Client Reporting
Solution and Best Innovative
Fintech Solution.

WealthBriefingAsia Awards 2017

Thank you WealthBriefing Asia for naming SS&C's Vision FI as best Client Reporting Solution and GWP as best Innovative Fintech Solution. We continue to develop innovative solutions to support all asset classes and portfolio types and provide our clients with the communication tools they need to grow their business.



NUMBERS YOU CAN COUNT ON.
ssctech.com

CLIENT COMMUNICATION EXCELLENCE AMID VOLATILE TIMES

Julian Webb, Head of Investment Data Management, Analytics and Client Communications, SS&C Technologies talks to *WealthBriefingAsia*'s editor **Tom Burroughes** on how its end-to-end client communications solution delivers results.

For over 30 years, SS&C Technologies, Inc. has created the most comprehensive powerhouse of software technology in the financial services industry - technology that complements our unrivaled expertise and professionalism in fund administration, insurance and pension funds, and asset and wealth management accounting and operations.

In recognition of this commitment to excellence, our Vision FI solution was awarded as *Best Client Reporting Solution* at the *WealthBriefingAsia* Awards 2017.

What is your firm's extra factor that explains why you won this award?

Vision FI delivers a robust end-to-end client communications solution. It is built to address the complex needs of business users in designing, producing, approving and publishing online and offline reporting content from a single, fully integrated baseline.

The Vision FI user experience is built with the business user in mind, allowing them to efficiently navigate the full complement of features and functionality necessary to address scheduled and *ad-hoc* reporting obligations.

Additionally, the depth and experience of our global professional services & support team deliver world-class, ongoing delivery and support for our clients.

What specific qualities do your colleagues have that helped you to win?

The SS&C Vision FI team is comprised of client communications experts; possessing deep practical, consultative and implementation experience focused on delivering accurate,

complete and timely content expressive of the investment advisors delivery on their investment mandate.

Members of the team have first-hand experience as former heads of client reporting, business analysts and senior reporting leads at buy-side organizations.

Explain how you intend to stay out front of the competition.

With momentum in the marketplace, we are well positioned to continue addressing the evolving needs of our clients and prospects as they modernise their approach to client communications.

Vision FI provides a comprehensive platform, enabling our clients to address the full spectrum of reporting and communications obligations they have across print and online distribution mediums.

What obstacles has your firm had to overcome to be an award-winner?

Technology is not a static concern, it evolves and the demands of our clients match and sometimes exceed that velocity.

Investors are demanding increased transparency and their expectations for high quality, personalised, multi-channel investor communications have shifted dramatically in recent years. This creates both a challenge and an opportunity.

Explain areas where you are pushing forward, such as new products and services.

We will continue to advance our capabilities

to bring even more interactive content design, production and workflow features to our clients – to help them best meet the needs of their clients, the investors whom need transparency on their investments.

The emphasis is on allowing our clients to produce reporting content that is a differentiating service to their clients. Vision FI provides unparalleled autonomy and control for firms to define and deliver compelling content.

What will this award do for your business?

We very much appreciate this award. The recognition will be very well received by the Vision FI team and is testament to their dedication and expertise.

We also look forward to sharing this success with our clients and prospects; it most certainly solidifies our position as a market leader and innovator.

How does the award help you to spread the message about what you do?

Being awarded as the best solution for 2017 certainly backs our positioning as leaders in the space with respect to product functionality as well as development and implementation expertise.

SS&C has a strong presence across Asia with offices in 9 countries in the region.

The growth of the wealth management industry in Asia presents a significant opportunity for the Vision FI business.

This award will help us build recognition in the region and we are excited by the opportunity to work with firms across Asia to help them to improve their client communications. ■

“THE SS&C VISION FI TEAM IS COMPRISED OF CLIENT **COMMUNICATIONS** EXPERTS; POSSESSING DEEP **PRACTICAL**, CONSULTATIVE AND IMPLEMENTATION **EXPERIENCE** FOCUSED ON DELIVERING **ACCURATE**, COMPLETE AND TIMELY CONTENT **EXPRESSIVE** OF THE INVESTMENT ADVISORS DELIVERY ON THEIR INVESTMENT MANDATE.”

THE WEALTHBRIEFINGASIA AWARDS WINNERS 2017

WEALTH MANAGEMENT TECHNOLOGY CATEGORIES *(open to technology vendors only)*

FRONT OFFICE SOLUTION



INNOVATIVE FINTECH SOLUTION



PORTFOLIO MANAGEMENT



CLIENT ACCOUNTING – EDITOR'S AWARD



CLIENT REPORTING



ONBOARDING – EDITOR'S AWARD



PRIVATE CLIENT CATEGORIES

LEGAL TEAM – GREATER CHINA



LEGAL TEAM – SOUTH-EAST ASIA



TAX/ACCOUNTANCY TEAM – GREATER CHINA



TAX/ACCOUNTANCY TEAM – SOUTH-EAST ASIA



INDEPENDENT TRUST OR FIDUCIARY COMPANY – GREATER CHINA



INDEPENDENT TRUST OR FIDUCIARY COMPANY – SOUTH-EAST ASIA



WEALTH MANAGEMENT TECHNOLOGY CATEGORIES *(open to all)*

INNOVATIVE CLIENT SOLUTION



MARKETING/ PR CATEGORIES

BEST MARKETING OR PR CAMPAIGN



INVESTMENT MANAGEMENT CATEGORIES

ESTATE PLANNING



BEST ASSET MANAGEMENT FIRM SERVING FAMILY OFFICES AND PRIVATE BANKS



INDEPENDENT WEALTH MANAGER



ALTERNATIVE INVESTMENT MANAGER



FUND MANAGER



PLATFORM PROVIDER



EXTERNAL ASSET MANAGEMENT PLATFORM AND OFFERING



FX SOLUTION PROVIDER





PRIVATE BANKING CATEGORIES

BEST PRIVATE BANK – INVESTMENT MANAGEMENT
PLATFORM – EDITOR'S AWARD

UHNW TEAM



BEST PRIVATE BANK – TALENT MANAGEMENT



DOMESTIC CLIENTS TEAM



BEST PRIVATE BANK – CLIENT SERVICE



OVERALL ASIA PRIVATE BANK



BOUTIQUE PRIVATE BANK



HIGHLY COMMENDED

PRIVATE CLIENT CATEGORIES - INDEPENDENT TRUST
OR FIDUCIARY COMPANY – GREATER CHINA

OTHER WEALTH MANAGEMENT CATEGORIES

CSR – EDITOR'S AWARD

RHTLaw TaylorWessing
International Capabilities Delivered Locally



WOMEN IN WEALTH MANAGEMENT (INDIVIDUAL CONTRIBUTION)

ONG YENG FANG



INTERNATIONAL FINANCE CENTRE



MINISTRY FOR THE ECONOMY,
INVESTMENT AND SMALL BUSINESS
PALAZZO ZONDARIL, MERCHANTS STREET, VALLETTA, MALTA



OUTSTANDING CONTRIBUTION TO WEALTH MANAGEMENT THOUGHT LEADERSHIP (INDIVIDUAL)

PHILIPPE LEGRAND

London & Capital



WEALTH PLANNING TEAM – GREATER CHINA

Baker McKenzie.



OUTSTANDING CONTRIBUTION TO WEALTH MANAGEMENT THOUGHT LEADERSHIP (COMPANY)



HERBERT
SMITH
FREEHILLS



WEALTH PLANNING TEAM – SOUTH-EAST ASIA

withers Khattarwong
Singapore's global law alliance



LEADING INDIVIDUAL (ADVISOR)

NICHOLAS JACOB

CHRISTIAN STEWART

FORSTERS



PHILANTHROPY OFFERING/INITIATIVE OF THE YEAR



BNP PARIBAS
WEALTH MANAGEMENT



LEADING INDIVIDUAL (BANKER)

HENRI LEIMER



Private
Banking



RISING STAR

WEI ZHANG

withers 衛達仕
律師事務所



LIFETIME ACHIEVEMENT

WILLIAM AHERN



AHERN LAWYERS
HONG KONG SOLICITORS



ATTENDEE LIST

The *WealthBriefingAsia* Awards 2017

A Ahern Lawyers Allen & Overy ANZ Appleby Appway Arton Capital Asiaciti Trust ASK Wealth Advisors	E EFG Bank Equiom Group ERI Banking Software	K KL Gates	St James's Place Wealth Management Sun Life Financial Hong Kong Swiss-Asia Financial Services
B Baker & McKenzie Baker & McKenzie.Wong & Leow Bank of Montreal BDO BMO Private Bank BNP Paribas Bordier & Cie (Singapore)	F Family Legacy Asia Finance Malta First Names Group Forsters Fragomen Worldwide Fullerton Fund Management FundCount	L LGT Bank (Singapore) LGT Private Banking Asia London and Capital Asia	T The Laurus Group The Watch Fund Thirdrock Group Thomson Reuters Trident Trust TriLake Partners
C Charles River Development Citi Private Bank Crossinvest (Asia) Pte	G Golden Equator Capital Grant Thornton GSM Law	M Mercer Milltrust International Group	U UBS Wealth Management Union Bancaire Privee UOB Alternative Investment Management UOB Private Bank
D Deloitte Dentons Rodyk & Davidson Dhruva Advisors Digital Times Transformation	H Herbert Smith Freehills HSBC Private Banking Huddleston Jones	O Oclaner Asset Management	W Withers Withers KhattarWong
	I ICICI Prudential Asset Management Indosuez Wealth Management Intertrust	P Private Wealth Management PwC	Z ZEDRA
	J JadeStonePartners Group Jersey Finance JTC Kensington	R RHTLaw Taylor Wessing Royal Bank of Canada	
		S Saint Lucia Asset Management SFO Asia Silverdale Capital Pte Singapore Management University SS&C Advent SS&C Technologies, Singapore	





WEALTHBRIEFINGASIA - ALWAYS AT THE CENTRE OF YOUR 360° VIEW ON THE WEALTH MANAGEMENT LANDSCAPE

WealthBriefingAsia is the leading source of subscription news and thought-leadership for over 16,000 wealth management professionals in Asia.

Register for a free trial
www.wealthbriefingasia.com

WealthBriefing

FAMILY
WEALTHREPORT

OffshoreRed

Compliance matters