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THROUGH THE **WEALTHBRIEFING** AWARDS PROGRAMME

EXCLUSIVE
THE 2017 EUROPEAN
AWARDS WINNERS

August 2017

WealthBriefing

WealthBriefing and its regional sister sites are the leading subscription-based business intelligence services for the wealth management community, with the latest news, analysis and in-depth features from around the globe. Delivered straight to subscribers' inboxes every day these services provide need-to-know business intelligence in a convenient and easy-to-read format.

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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 focussed 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.



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FOREWORD

Tom Burroughes, Group Editor, *WealthBriefing*

The *WealthBriefing* European Awards are created to salute the people who have set and continue to set the highest possible standards in delivering wealth management services in the region. It is fashionable for firms to talk about the need to put clients first but in the cases of those who win these awards and are shortlisted for them, they really are making good on such promises. In sometimes volatile markets and against an often turbulent geopolitical background, it is particularly appropriate to take note of those who provide superlative service and products.

At the core of the awards is the judging process and it is one that has been developed and refined across the years. Experts and senior figures from across the industry make up the panel of judges, such as lawyers, bankers, consultants, technology service businesses, tax specialists and fiduciary service providers. These judges give most weight to the quality of an entrant's written submission when deciding on a shortlist and eventual winner; they also draw on their own knowledge of an entrant in their choices. Importantly, judges do not rule on firms/individuals in their own specific sectors to avoid conflicts of interest and access to potentially commercially sensitive information. If judges consider certain categories are unfit for purpose, or need to be adjusted, they can make recommendations and the sections are reviewed at the end of each judging process. As the industry changes, so must the shape of the awards. Readers are able to find the list of judges on this news organisation's website.

Winning a *WealthBriefing* award is a loud shout of approval for what a firm and individual has done and also a tremendous way for the winners to promote their businesses and careers. To be named a winner in these awards is to have clearly demonstrated a level of excellence and hard work to peers and clients alike. And they are an incentive for the industry to continue striving to be the best.



OVERVIEW OF EUROPEAN WEALTH MANAGEMENT SECTOR

According to the latest Capgemini World Wealth Report as of the time of writing, Europe's population of high net worth individuals, and their wealth, grew by 4.8 per cent to 4.2 million and \$13.6 trillion in 2015 respectively, lower than the global average growth rates of 4.9 per cent and 4.0 per cent, respectively, due to Europe's ongoing fragile economic recovery. With the European economy showing more signs of expansion last year and into 2017 - buoyed perhaps by the election in May of centrist French president Emmanuel Macron - the figures may look stronger.

Europe may have been overshadowed by the vertiginous ascent of Asia as a wealth management region, and may not always boast the hot stories of new entrepreneurs coming to the fore, but it still wields a large stick in wealth

management. It is, after all, home to some of the world's largest banks, such as Deutsche Bank, BNP Paribas, Societe Generale and UBS. Europe's largest economy, Germany, has a cluster of venerable private banks and family offices typically working on serving the large Mittelstand business sector. And the UK remains home to Europe's largest financial centre, London. Brexit may cast a shadow (depending on one's point of view) over the future vibrancy of London, and may also cause some financial players to consider booking centres and location of European Union subsidiaries; even so, a wholesale exodus is not considered highly likely. France, Italy, the Netherlands and Nordics remain wealthy countries with HNW populations requiring high expertise and strong service. The European wealth manage-

ment market is tooling up to cope with further regulatory requirements, such as the MiFID II cluster of reforms designed to improve investor suitability and transparency over costs, as well as updated data protection rules.

The region's wealth managers are, like their counterparts in other parts of the world, facing the challenge - and opportunity - of innovations around fintech, such as widening use of mobile devices and automation of parts of the investment/advisory process. And given the developed nature of the European economy, finding new sources of growth while not neglecting existing clients is particularly important.

Europe hasn't always been home to the happiest financial stories in recent years but as a region its importance remains high and the best wealth managers can continue to prosper.

JUDGING PANEL

The 2017 *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.



ERIC BARNETT
Chief Executive
Kleinwort Hambros



ETIENNE D'ARENBERG
Partner
Bank Mirabaud



AUSAF ABBAS
Managing Director
Coombe Advisors



HANS-PETER BORGH
*Group Head of Wealth Management,
Member of the Management Board*
Banque Internationale a Luxembourg



SEBASTIAN DOVEY
Managing Partner and Co-Founder
Scorpio Partnership



GILLIAN AUSTIN-KING
*Senior Programme Manager,
CS-MIP Programme*
HSBC Bank



ROSALYN BREEDY
Partner
Wedlake Bell



WILLIAM DRAKE
Senior Advisor
Sandaire Investment Office



PAUL AYRES
Partner
BDO



TOM BURROUGHES
Group Editor
ClearView Financial Media



STEVE DYSON
Director
Investment & Wealth Management
Consultants

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.



MARK HUSSEIN

*Chief Executive Officer, HSBC Life (UK) and
Head of UK Insurance*
HSBC Bank



OLIVIER MAUGARNY

Head of Offering and Sales
BNP Paribas Wealth Management



JOHN REED

Chairman
EFG Private Bank



PENNY LOVELL

*Managing Director, Head of Private
Client Services*
Close Brothers Asset Management



RICHARD NUNNELEY

Vice Chairman
Floreat Wealth Management



MICHAEL REED

Managing Director
RBC Wealth Management



KEITH MACDONALD

Head of Wealth Management
EY



NICK PERRYMAN

Managing Director
UBS Wealth Management



TOM SLOCOCK

Managing Director
Deutsche Bank Wealth Management

**MATTHEW SPENCER**

Executive Director and Head of Business Development
Coutts

**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

**JEAN-LOUIS TOURNE**

Chief Executive
BNP Paribas Wealth Management

**IAN WOODHOUSE**

Director, Asset and Wealth Management Consulting
PwC

THANK YOU

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



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wealth manager.com

millenium
associates



ProFundCom
trusted digital marketing for finance



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MMD
MONEY MARKET DIRECTORIES



ATTENDEE LIST

The *WealthBriefing* European Awards 2017

A

ABN AMRO Private Banking
ABN AMRO Private Banking
ACPI Investments
Anaford Attorneys
Appway
Arbuthnot Latham
Ardan
Assured Thought
Avaloq
Avignon Capital
Ayondo Markets

B

Bank Schroder & Co
Banque Internationale a
Luxembourg
Banque Paris Bertrand Sturdza
Barclays
BDO
Bedell Cristin
BITA Risk
Blick Rothenberg
BNP Paribas
BNP Paribas Wealth
Management
Bordier UK
Boston MFO
Brewin Dolphin

C

Cadell + Co
Calastone
Capco
Charities Aid Foundation
Charles Russell Speechlys
Charles Stanley
Chase de Vere
Citi Private Bank
Close Brothers Asset
Management
Commerzbank
Coombe Advisors
Coutts
CS Global Partners

D

DBS Wealth Management
Deloitte
Deutsche Bank Wealth
Management
Dorsum Co
Druces
Dynamic Planner

E

ERI Banking Software
Esteria
ETF Securities

Expersoft Systems
EY

F

FactSet
Falcon Private Wealth
FE
FinanceMalta
Financial Times
Finantix
Find A Wealth Manager
FTI Consulting

G

Globacom Technologies
Government of Jersey
Guernsey Finance
Guinness Asset Management
Gulland Padfield

H

Hampshire Community Bank
Hassium Asset Management
Hayhill Wealth
Headland Consultancy
Hearsay Systems
Highworth Research
Howard Risk Associates
HSBC Bank
HSBC Private Banking

I

IBO AG
Intertrust
InvestCloud
Investec Wealth & Investment
Investment & Wealth
Management Consultants

J

Jersey Finance
JTC

K

Kingsley Napley
KlarityRisk
Kleinwort Hambros
Knadel

L

Lincoln Private Investment Office
Lombard Odier
London & Capital
Lyxor ETF

M

Maurice Turnor Gardner
Mazars
MilleniumAssociates
Mirabaud & Cie SA
Multrees Investor Services

N

National Philanthropic Trust UK
New Quadrant Partners
New York Times
Northern Trust
Nykredit Private Banking

O

Objectway
Obrium
Ogier
Online Wealth
Oracle Cancer Trust

P

Peritus Investment Consultancy
Pershing, a BNY Mellon
Company
Phoenix Financial PR
Platform Securities
Plurimi
Profile Software
ProFundCom
Prometeia
Protiviti
PwC
PWM

Q

Qumram

R

Rathbones
Rawlinson & Hunter
RBC Wealth Management
REYL & Cie
RiverPeak Wealth Limited
Rothschild & Co
Rothschild Wealth Management
RSM UK Tax & Accounting
RVB Currency

S

S&P MMD
Saffery Champness Registered
Fiduciaries
Saffery Champness Suisse SA
Salamanca Group Trust &
Fiduciary
Salesforce

Saunderson House
SAXO
Scorpio Partnership
SG Hambros
Signia Wealth
SK Enterprises
smartKYC
SNR Global
Societe Generale Private Banking
SS&C Advent
SS&C Technologies
St James's Place Wealth
Management
Standard Chartered
Standard Life Wealth
Stanley Davies
Stephenson Harwood
Stonehage Fleming
swissQuant Group
Synpulse

T

Taylor Wessing
td partners
Thomson Reuters
Tilney Group
Tindoco

U

UBS Wealth Management
Union Bancaire Privée

V

Veale Wasbrough Vizards
Venture Valuation
Vistra UK

W

Waverton Investment
Management
Wealth Management Association
WealthArc
Wedlake Bell
Whitmill Trust Company
WidsomTree
Wilsons Solicitors
Withers

Z

ZEDRA

ACPI



INVESTMENT MANAGERS



ESTABLISHING LIFELONG PARTNERSHIPS

“Our sole objective is to preserve and grow our clients’ wealth”

A BOUTIQUE PLAYER WITH A BIG REACH

Daniel Pasini, COO of ACPI Investments Ltd talks to **Tom Burroughes** from *WealthBriefing* about protecting wealth and delivering risk-adjusted returns through the cycle.

A CPI was originally a family office for two former partners of Goldman Sachs and a few select families. Our genesis as a broader-based investment manager began in 2007, and since then we have evolved into a boutique provider of investment solutions with over \$3.8 billion in assets – counting ultra-high net worth individuals and their families, charities and family offices amongst our clients.

Our core business is portfolio management, but we also source and execute transactions in real estate, private equity and debt. We have over 70 staff employed across our offices in London, Jersey and South Africa.

This is the second year in a row that ACPI won the Specialist Wealth Manager (sub £5 billion) award. What do you believe differentiates you from your peers?

We remain committed to our clients and we will continue to establish and develop partnerships with them, by offering a thoughtful portfolio management service that is at the heart of any wealth management business. We also believe that our collegiate working environment differentiates us. We are equally committed to our employees - we want to attract and retain talented individuals and make sure that they can grow within our framework.

We are proud of our low staff turnover. We look towards providing innovative investment solutions. Our ability to originate, manage and execute private investments across debt, real estate and equity is not something offered by every investment manager. We are very selective about the type of transactions we undertake and our partners always invest alongside our clients.

What does winning this award mean to you as a firm?

Naturally, we were very pleased to be acknowledged for our achievements. We would like to thank *WealthBriefing's* judging panel for their

consideration. As a firm, we have not often engaged with the wider public, so these awards are a good opportunity to bring awareness of the company and to be recognised by our peers. It is also a testament to our employees for all their hard work and dedication to our clients.

What obstacles do you believe you face?

The first thing to remember is that the industry is in a growth phase. People are living longer, wealth is rising relative to incomes, and people are gravitating towards investment managers who can provide a broad investment service with the possibility of niche investments that are not part of the standard private banking offering. In order to offer a holistic client service, we need to be in a position to hire the best available people. That being said, it is also a challenging environment for independent firms.

Increased regulation and political uncertainty have very tangible consequences for our clients and our business. MIFID II and Brexit come to mind. These will be challenges that we have to confront and do so quickly. These, and future unknown events, have the potential to significantly disrupt the industry and firms will need to remain flexible to succeed in this changing world.

You say that you provide innovative investment solutions. Could you give us some examples?

Let's focus on two recent thematic investments we have executed for our clients. ACPI recently launched a vehicle to invest in private debt. The fund closed on June 30th with over \$100 million in assets under management. Private debt is attractive as an asset class, it offers uncorrelated yields with relatively low volatility on a medium term outlook (2-3 years).

With debt secured against assets, it can also offer a relatively attractive risk-reward

profile which is difficult to obtain in traditional fixed income markets. There is currently a liquidity mismatch of need versus supply which leaves an opportunity open to non-bank lenders who can fulfil this role. The fund will invest in asset-backed lending opportunities, targeting an 8-10 per cent IRR net of fees.

What is unique is that the fund will not be participating in transactions introduced by third-party banks and brokers – all of the borrowers are known to the firm and the transactions will be originated by ACPI. We have also invested in an Indian equities UCITS fund which we launched in conjunction with our Indian investment management partner, Quantum Advisors. We feel that India, even though it accounts for less than 1 per cent of the MSCI World Index, offers an attractive, long term secular growth opportunity for investors.

As a firm, we believe in the long term potential growth of India, and we have already undertaken a number of private equity, real estate and private debt investments across the country. India will continue to be a focus area of ours as we believe the narrative has changed and they are embarking on long term growth phase.

The strategy will be based on Quantum's Q India Composite Strategy, which has annualised returns +15.4 per cent (net of fees, in dollars) since its inception in 2001.

Looking ahead to the future, what is next on the horizon for ACPI?

Our long term ambition is to become a leading international investment management house focusing on UHNW private clients and tailored investment solutions for institutions. To accomplish this objective, we will need to continue to deliver portfolio performance, innovative solutions, and attract the best talent in the industry.

We do not discount growth through acquisition and believe that the trend towards consolidation will continue in the industry. ■

“WE REMAIN **COMMITTED** TO OUR CLIENTS AND WE WILL CONTINUE TO **ESTABLISH** AND **DEVELOP** PARTNERSHIPS WITH THEM, BY **OFFERING** A **THOUGHTFUL** PORTFOLIO MANAGEMENT **SERVICE** THAT IS AT THE HEART OF ANY WEALTH MANAGEMENT BUSINESS.”



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- Automated Client Onboarding
- Mobility Strategy & Implementation
- Client Portal and Advisor Portal
- Enhancing Efficiency through Mobility
- Systems Real-time Integration
- Enterprise Bus & Middleware

SUCCESS BY LISTENING TO WHAT CLIENTS REALLY WANT

Vijay Kartha, CEO of Globacom tells Tom Burroughes from *WealthBriefing* how partnership with clients holds the key to its success.

A Dubai-based FinTech firm Globacom Technologies is an award winning global financial technology company that provides solutions to the investment management industry. Many of these solutions are in the realm of client engagement, such as; client portals, advisor portals, and end-to-end onboarding. They are also specialists in integration and can integrate any and all of your front and back-end systems together with our proprietary tool called ReachOut.

Globacom Technologies won the award for *Change Management Process/Best Implementation of a Technology Solution*, likely for their seamless implementation of technology and their ability to work closely with their clients to achieve their digital transformation goals without any interruption of their client services.

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

We believe that what differentiates us from our competitors is that we view ourselves as partners and not just vendors. Add to that a deep domain knowledge by our technical and delivery leads and you get an implementation that our clients have consistently been highly satisfied with.

We work very closely with all of our clients, understand their needs, and make sure that the project is implemented seamlessly, on time and under budget. We enhance their services and provide them with digital transformation without any hiccups in their services. Their clients just see this new enhanced service overnight.

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

There are many qualities in our colleagues that have helped us win the award but the two major ones I want to point out are their team spirit and incredible work ethic. When we hire we look for those who are excellent team players that work excellently in a flat organizational structure.

The objective comes first and we all support each other to reach our respective objectives regardless of level in the organisation.

The work ethic that my colleagues have is incredible. If a client needs something, they are at the office until it gets done regardless of the time of day or night. They never like to let a client or team member down and that is something I believe we all share.

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

We plan on staying ahead of the competition by listening to our clients and keeping our ears to the ground. We continue to innovate and provide the market with what they need.

Many of our products have come from the needs of our clients. For example, some of our clients have expressed strong interest in an automated end-to-end onboarding system that can connect to various backend systems such as their CRM. We then do the research, develop the programme, test it, and implement it (much to our clients' excitement). It is now one of our most popular solutions.

Our company structure has helped us with the flexibility to be able to respond quickly to market demands and we will continue to do so.

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

The largest obstacle was that we did not have a marketing department that would be able to apply for the award. That is why we brought on Omar Hamwi, who is heading our Global Strategy and Business Development which includes our marketing efforts and award applications.

A former World Banker and management consultant, he brings nearly a decade of experience in reaching new markets all over the globe. We are happy to have him on board and is helping us get the word out there on how we can help wealth management companies better engage their clients digitally.

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

We are currently working on many new areas and products. Of course, we cannot go into too much detail here but what I can say is that, we are working on some very smart technology. We are also adding some additional financial planning features that will complement our end-to-end onboarding tool and meet the needs of the US market which we are currently growing in.

Another excellent product we are working on is a combined client portal and onboarding tool for fund management. This will allow employers to onboard new employees and manage their accounts with great ease. Should these employers wish, their employees can also manage their own accounts.

What will this award do for your business?

I believe this award will impact our business both internally and externally. For our team that works very hard every day to put our clients first and provide the top notch quality service and technology on a daily bases, this award provides them with the recognition they deserve.

All of our clients are reference clients for a reason, and this award supports that when speaking with prospects. We expect this award will help set prospect and client expectations and help keep our standards high.

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

We are honored to have been selected to achieve this award. We hope that by publicising this to wealth management specialists such as your followers and subscribers who will read this article and related other social media posts on the award, will see what we do and how seamlessly our technology can integrate with new and legacy systems and how we can enhance their services for their clients through our digital products and services. ■

“WE **BELIEVE** THAT WHAT DIFFERENTIATES US FROM OUR COMPETITORS IS THAT WE VIEW OURSELVES AS **PARTNERS** AND NOT JUST VENDORS. ADD TO THAT A DEEP DOMAIN **KNOWLEDGE** BY OUR TECHNICAL AND DELIVERY LEADS AND YOU GET AN IMPLEMENTATION THAT OUR CLIENTS HAVE **CONSISTENTLY** BEEN HIGHLY **SATISFIED** WITH.”

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DRAWING ON ITS HERITAGE TO PUSH FORWARD

Chris Allen, HSBC Regional Head of Global Private Banking, UK, Channel Islands, France and Germany tells **Tom Burroughes** from *WealthBriefing* how it is building its capabilities to take client service to new heights.

H SBC Private Banking won the award for best overall UK Private Bank.

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

What we have concentrated on in the last few years is looking at the kind of client that will get the most out of our particular expertise and capabilities, and making sure that we keep them at the centre of everything we do.

HSBC's heritage as a commercial bank is part of our culture, we have a really deep knowledge and understanding of business owners, and a really comprehensive set of capabilities. In the private bank we see it as our role to bring all of that together to support individual business owners and their families. Having a clear picture in mind of what we want to be known for has been really important over the last few years.

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

As a group, we hold ourselves to the standard of being open, dependable and connected, and that certainly goes for the private bank. A good relationship has to start with being open: you have to listen to a client to get a proper understanding of their needs. It goes without saying that you can only succeed in winning trust by being dependable.

Being connected is perhaps the thing that has been really transformative. We work in a much more collaborative way now. That means working with colleagues from other parts of the group to understand a client's business and how it relates to their personal wealth needs, or to put together a bespoke deal.

We are also focusing more on teamwork within the private bank, with our relationship managers, wealth planners, credit advisers and investment specialists working more closely together to support individual clients.

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

There are a few things that really mark HSBC out and which we will continue to harness: one is our genuinely global reach. We are part of

one of the most expansive financial institutions in the world covering the Americas, Europe, the Middle East, Africa and the Asia-Pacific region. That gives us excellent insight into the particular investment climates in these regions, which greatly enriches our investment capabilities and ensures that we can offer wealth management services that are best in class.

The other is our universal banking model. We work very closely with some of the most senior leaders across the Group on behalf of our clients, and it brings benefits that cut right across the spectrum; from those who might not quite be private banking eligible yet, to our biggest ultra-high net worth clients.

For example, in the high net worth space, we might work with our commercial banking colleagues to get to understand a shared client's business assets so that we can put together an appropriate lending offering for them faster than another bank could.

For an UHNW client, it may mean working with our investment banking colleagues to put together a bespoke deal for their family business.

Being able to look at a business owner's business and personal financial needs in the round, and having a really competitive offering to deliver on both gives us an edge that very few others can match.

Finally, we also have the balance sheet to match our ambition to be the private bank of choice for our clients; this allows us to provide innovative credit solutions to meet their often very specific needs.

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

We have been through a lot of change in the last few years. That hasn't been an obstacle as such, as we had a clear vision of where we wanted to get to, but it has been a lot of work.

Along with the rest of HSBC Group, the private bank has refocused on serving clients from a smaller number of key markets and that's helped us to have a much clearer understanding of our client base and to develop what we offer to them.

Within our UK private banking business, we've also moved away from an emphasis

on commercial real estate lending, which is something we used to be particularly known for but which can be catered for in our commercial banking business, to offer a much more comprehensive wealth management service, with really strong wealth management capabilities. That's certainly not a transition that can happen overnight, and we've needed to invest in our existing team and also bring in new expertise in order to get there.

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

We've looked very closely at the typical path that successful entrepreneurs take as they grow a business and eventually grow their wealth, and we have built our proposition around the different needs they have at different phases: that will continue to be a focus.

We are also growing our presence in the regions: from our work with our commercial banking colleagues, we know there is an unmet need for private banking services outside London and the South East.

A third area will be to continue to build our investment capabilities. We already have a very strong reputation in the alternatives space and in recent years we have strengthened our discretionary services and we are really proud of the returns that our core portfolios are delivering for clients. We are going to keep building that offering: we have an outstanding resource through HSBC Global Asset Management, and we are building a really strong range, from fully diversified multi-asset portfolios for HNWs to more tailored strategies for our UHNW clients.

What and who are your role models?

I've been fortunate enough to have had some really great mentors during my career, and mentoring is something I encourage very strongly: we have our own scheme within the UK private bank. I am always keen to give these initiatives very visible support: people sometimes don't feel like they are allowed to take time to think about their own career and what they want next, but it's probably something we should all do more. ■

"YOU HAVE TO LISTEN TO A CLIENT TO GET A PROPER UNDERSTANDING OF THEIR NEEDS. IT GOES WITHOUT SAYING THAT YOU CAN ONLY SUCCEED IN WINNING TRUST BY BEING DEPENDABLE."

THE WEALTHBRIEFING EUROPEAN AWARDS WINNERS 2017

HIGHLY COMMENDED

WEALTH MANAGEMENT TECHNOLOGY CATEGORIES (TECHNOLOGY VENDORS ONLY) - CLIENT REPORTING



UK PRIVATE BANKING CATEGORIES CHARITY TEAM



WAVERTON



PRIVATE CLIENT CATEGORIES PRIVATE CLIENT LAW FIRM

TaylorWessing



UK PRIVATE BANKING CATEGORIES OVERALL UK PRIVATE BANK



EUROPEAN PRIVATE BANKING CATEGORIES DOMESTIC CLIENTS TEAM

Nykredit
private banking



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STONEHAGE
FLEMING



SPECIALIST WEALTH/PRIVATE INVESTMENT MANAGER - OVER £5 BILLION AUM



ETF PROVIDER



ALTERNATIVE INVESTMENT MANAGER



UNION BANCAIRE PRIVÉE



EXTERNAL ASSET MANAGEMENT PLATFORM AND OFFERING - EDITOR'S AWARD



BNP PARIBAS
WEALTH MANAGEMENT



WEALTH MANAGEMENT TECHNOLOGY CATEGORIES (open to technology vendors only)

FRONT OFFICE SOLUTION



OUTSOURCING SOLUTION

Pershing®

➤ A BNY MELLON COMPANY™



TRANSACTION PROCESSING SOLUTION



DATA PROVIDER

FACTSET



PORTFOLIO MANAGEMENT



RISK PROFILING SOLUTION

bitarisk.



CLIENT COMMUNICATIONS



RISK MANAGEMENT

KlarityRisk



CLIENT REPORTING



ON-BOARDING

Appway



COMPLIANCE



INNOVATIVE CLIENT SOLUTION



CRM SYSTEM



CHANGE MANAGEMENT PROCESS/ BEST IMPLEMENTATION OF A TECHNOLOGY SOLUTION





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

INNOVATIVE FINTECH SOLUTION



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

INNOVATIVE CLIENT SOLUTION



UK PRIVATE BANKING CATEGORIES

PRIVATE BANK – CUSTOMER FACING DIGITAL CAPABILITIES



LOMBARD ODIER
LOMBARD ODIER DARIER HENTSCH



HNW TEAM



BEST PRIVATE BANK – CLIENT SERVICE



INTERNATIONAL CLIENTS TEAM



CHARITY TEAM



DOMESTIC CLIENTS TEAM



UHNW TEAM



OVERALL UK PRIVATE BANK



EUROPEAN PRIVATE BANKING CATEGORIES

BEST PRIVATE BANK – INVESTMENT MANAGEMENT PLATFORM



UNION BANCAIRE PRIVÉE



INTERNATIONAL CLIENTS TEAM



BEST PRIVATE BANK – CLIENT SERVICE



ABN-AMRO Private Banking



DOMESTIC CLIENTS TEAM



ABN-AMRO Private Banking



UHNW TEAM



BNP PARIBAS
WEALTH MANAGEMENT



OVERALL EUROPEAN PRIVATE BANK



BNP PARIBAS
WEALTH MANAGEMENT



PRIVATE CLIENT CATEGORIES

PRIVATE CLIENT LAW FIRM



PENSIONS ADVISOR OF THE YEAR



Close Brothers
Asset Management



OFFSHORE LAW FIRM



INDEPENDENT TRUST OR FIDUCIARY COMPANY



PRIVATE CLIENT LAWYER

JAMES QUARMBY



INSTITUTIONAL TRUST OR FIDUCIARY COMPANY



Wealth
Management



FAMILY LAW LEGAL TEAM



CharlesRussell
Speechlys



MANAGEMENT CONSULTANCY



Building a better
working world



OTHER WEALTH MANAGEMENT CATEGORIES

INTERNATIONAL FINANCE CENTRE



WOMEN IN WEALTH MANAGEMENT (INDIVIDUAL CONTRIBUTION)

KATHERINE ELLIS



GLOBAL CUSTODIAN TO PRIVATE CLIENT BUSINESSES



WOMEN IN WEALTH MANAGEMENT (COMPANY CONTRIBUTION) – EDITOR'S AWARD



WEALTH PLANNING TEAM



OUTSTANDING CONTRIBUTION TO WEALTH MANAGEMENT THOUGHT LEADERSHIP



PHILANTHROPY OFFERING/ INITIATIVE OF THE YEAR



LEADING INDIVIDUAL (BANKER)

HELEN WATSON



RISING STAR

DAVID CLEREY



LIFETIME ACHIEVEMENT

DAVID BELLAMY



MARKETING / PR CATEGORIES

BEST MARKETING OR PR CAMPAIGN





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