

ACCLAIM

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

The Eleventh Annual *WealthBriefing* Swiss Awards 2024



February 2024

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Huddleston Jones



Foreword

TOM BURROUGHES

Group Editor, *WealthBriefing*

The *WealthBriefing* Swiss Wealth Management Awards, now in their eleventh year, have grown to become a must-attend event for the Alpine state's wealth sector. The enthusiastic attendance and variety of categories are testimony to how important it is to salute high-achievers in the sector. As readers can see from the variety of firms and individuals involved, the awards programme captures the diversity of business models and approaches in Switzerland's wealth sector. Large banks jostle alongside boutique law firms and fintechs.

A crux of the programme is the judging process. The organisers thank them for the tremendous diligence, hard work and objectivity in drawing up the list of winners, and for their advice in how to improve and fine-tune the awards. A list of the judges can be found on the *WealthBriefing* website. We know from past awards how valued the awards are, and the rigour of the judging process means winning an award is a great achievement.

Awards are a great chance for winners to explain why they think they won, how they intend to remain at the forefront of the industry, and their views about challenges and opportunities. Such a programme is also a good way for firms to promote brands, and raise and sustain morale among their colleagues. Awards are, to a degree, a sign of how hard work pays off. They're also a chance for businesses to swap ideas, view cases of best practice, and see what inspires their peers.

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Overview Of The Swiss Wealth Management Sector

A country that has seen several regulatory changes, Switzerland remains the world's top offshore wealth destination. In 2022, according to Statista, it was the top offshore place for private wealth globally, followed by Hong Kong and Singapore. In that year, offshore assets in Switzerland amounted to about \$2.4 trillion dollars.

While bank secrecy doesn't apply for foreigners using Swiss accounts any longer, the country has been able to reinvent itself to a degree – witness its prowess in areas such as specialist investment, fintech and digital assets. Switzerland's neutrality – while not always easy to maintain – is a valued characteristic. High education standards, high-quality transport connections and quality of life add to the mix.

The country is sharpening its competitive act around sectors such as fund, introducing Limited Qualified Investor Funds

(L-QIFs), giving Switzerland a chance to compete more fully against rival hubs such as Luxembourg. Of course, the dramatic UBS/Credit Suisse merger of 2023 leaves the country with one universal bank. A crop of international banks that operate in the country, such as Citigroup, Barclays, BNP Paribas and LGT, among others, will ensure a desire for diversification isn't neglected. Swiss local players such as Lombard Odier, Vontobel, Pictet, Julius Baer, EFG International and Union Bancaire Privée ensure that complacency won't be an option. This remains a nation with a lot of banks, asset managers and various financial institutions.

Finma's new regulations for external asset managers continue to bed in, and the country is developing rules to ensure digital assets, for example, grow without causing stresses on the financial system. Switzerland remains one of the world's power players in finance.

Why Wealth Managers are the Ultimate Private Market Matchmakers

(in partnership with Hywin Wealth & VP Bank)

This report tackles both the supply and demand for private market opportunities in both the Asia-Pacific region and globally, a topic which will continue to be hugely important for the wealth management industry as H/UHNWs seek enhanced returns and diversification in a challenging investment environment and billions of “dry powder” await deployment.

External Asset Managers in Asia - New Directions for Rapidly-Expanding Sector

(in partnership with UBS)

Our second annual report examining the growth of Asia's EAM sector, covering both the powerhouses of Singapore and Hong Kong, and emerging markets like Thailand and the Philippines. This study looks at the growth prospects for independent advisors in the round as they seek to tap the region's booming wealth and growing client acceptance of the EAM model.

Family Office Focus: An Update of the Industry's Efficiency in Accounting and Investment Analysis

(in partnership with FundCount)

A deep dive into the key technological and operational challenges facing family offices in their accounting and investment analysis activities. Based on surveys and interviews

among family offices managing over \$72 billion in assets, this is an invaluable benchmarking tool for the sector which presents fascinating insights into future developments from a range of industry experts.

Applying Artificial Intelligence in Wealth Management - Compelling Use Cases Across the Client Life Cycle

(in partnership with Finantix & EY)

This comprehensive report identifies elements of the institution and advisor's workloads that are ripe for AI amelioration, and points the way for firms seeking to maximise the competitive advantages offered by new technologies. AI experts and senior industry executives enrich each chapter, answering crucial questions on risk, KYC/AML, compliance, portfolio management and more.

Decoding The Digital Landscape for UHNWIs

(in partnership with Jersey Finance)

This report explores the digitalisation of - and digital assets in - Jersey's wealth management sector. It explores the shifting sands - both economic and regulatory - on which the digital sector rests.

Winning Women in MENA

(in partnership with First Abu Dhabi Bank)

This ground breaking new research examines the growth of female

entrepreneurship in the region. More specifically it looks at how women are driving family office strategy as well as the relationship between MENA's UHNW female clients and the wealth management industry.

Technology & Operations Trends in Wealth Management 2023

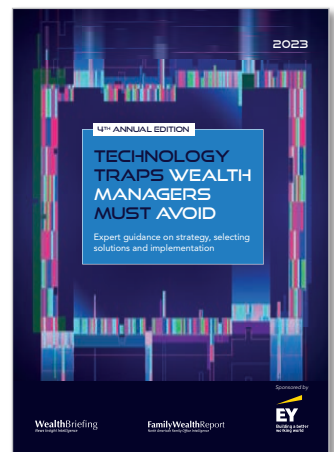
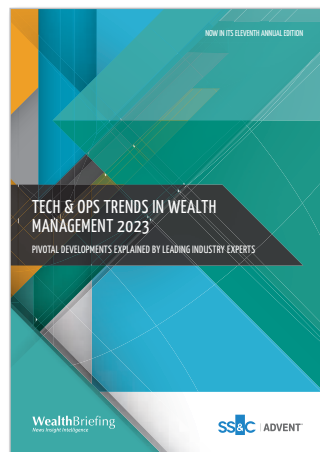
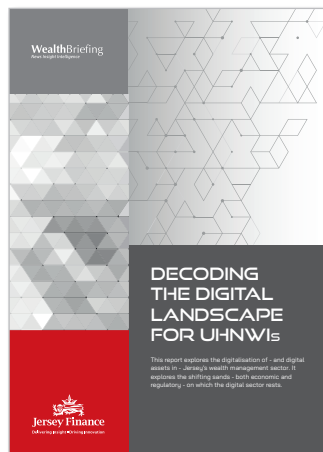
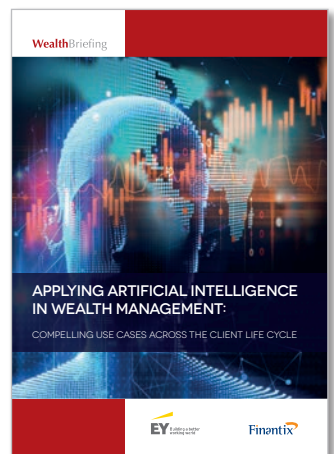
(in partnership with SS&C Advent)

This succinct yet wide-ranging report shines a light on both macro and micro trends, beginning with industry growth sentiment and ending on operating model evolution, taking in every key area of development in between. It brings together datapoints and candid comments senior executives at leading consultancies across the world's major wealth markets to create an invaluable peer benchmarking tool.

Technology Traps Wealth Managers Must Avoid 2023

(in partnership with EY)

With EY providing the overview, this report draws on the front-line experience of many of the technology sector's biggest names, in recognition of the fact that they are the ones going in to solve wealth managers' most pressing problems and have typically seen the ramifications of firms' choices play out numerous times - not to mention in various contexts globally.



The Judging Panel

The *WealthBriefing* Swiss Awards 2024 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 Swiss 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.



MARC BERGER
Partner
EY



PHILIPPE BONGRAND
Chief Executive Officer
FNZ



FRANCK BONIN
Chief Executive Officer
Societe Generale
Private Banking
Switzerland



JUDITH CHATOO
Executive Director
Saffery Trust (Suisse)
S.A.



CÉCILE CIVIALE
VUILLIER
Chief Executive Officer
Private Client Group
Head, Trustconsult
Group S.A



DR ARIEL SERGIO
DAVIDOFF
Partner and Board Member
of Successful Companies
Lindemann
Rechtsanwälte



JAMES DAY
Founder and
Managing Director
Peritus Investment
Consultancy



PIERRE DUPONT
Managing Partner
WIZE by TeamWork



STEVE DYSON
Director
Investment & Wealth
Management
Consultants



LAURENT GAGNEBIN
Chief Executive Officer
Rothschild & Co



XAVIER ISAAC
Co-Founder and CEO
Accuro



LAURENCE MANDRILE
AGUIRRE
Managing Director
Citi Private Bank



DANIEL MARTINEAU
Executive Chairman
Summit Trust
International



ANDREW MCCALLUM
Senior Partner
Rawlinson & Hunter



MARK MILES
Partner, European Head
of Wealth Management
McLagan and Scorpio
Partnership,
(Aon companies)



JEAN-CHRISTOPHE
PERNOLLET
Chief Risk Officer
Edmond de Rothschild
Group



OSMOND PLUMMER
Academic Lead
Wealthcoaching.ch



RAY SOUDAH
Founding Partner
and Chairman
MilleniumAssociates

AW+SWITZERLAND

A directory of Swiss wealth management and private banking services for US, Canadian, and Latin American citizens, residents, and expats



americanswelcome.swiss

The Judging Panel

A shortlist was identified from the hundreds of entries received for these awards and a discussion took place with the judges to agree the winner of each category. The judges were split into three groups, dependent on their industry; a panel of trusted advisors were responsible for judging the private banking categories; a panel of private bankers judges the trusted advisor categories; and new for this year we had a specialist group of tech experts judging the technology categories. This was to ensure that commercially sensitive information was kept confidential and conflicts of interest were avoided.



MATTHEW SPENCER
Advisor
Various



PATRICK STAUBER
Group Chief Executive
Officer
Marcuard Heritage



PHILIPPE STEFFEN
Executive Director,
Head of Operations
REYL & Cie



NICOLAS SYZ
Head of Private Banking
Syz Group



MIKE TOOLE
Owner Director
**Elterwater Consulting
Ltd**



TOBIAS WAGNER
CEO Switzerland
Calliopa Capital



BRUCE WEATHERILL
Chief Executive
Weatherill Consulting



DAVID WILSON
Partner
Schellenberg Wittmer





WINNER: Alpen Partners AG



WINNER: AMINA Bank



WINNER: Azqore SA



WINNER: Banque Internationale à Luxembourg (Suisse)



WINNER: Nadia Bargetzi - Banque Internationale à Luxembourg (Suisse)



WINNER: Barclays Private Bank



WINNER: Bedrock SA



WINNER: DART Talent & Executive Search



WINNER: Joseph Benhamou - CBH Compagnie Bancaire Helvétique



WINNER: CBH Compagnie Bancaire Helvétique



WINNER: ERI



WINNER: HSBC Global Private Banking



WINNER: HSBC Global Private Banking

The aixigo:BLONX Wealth Management Platform

brings ESG to the wealth management sector

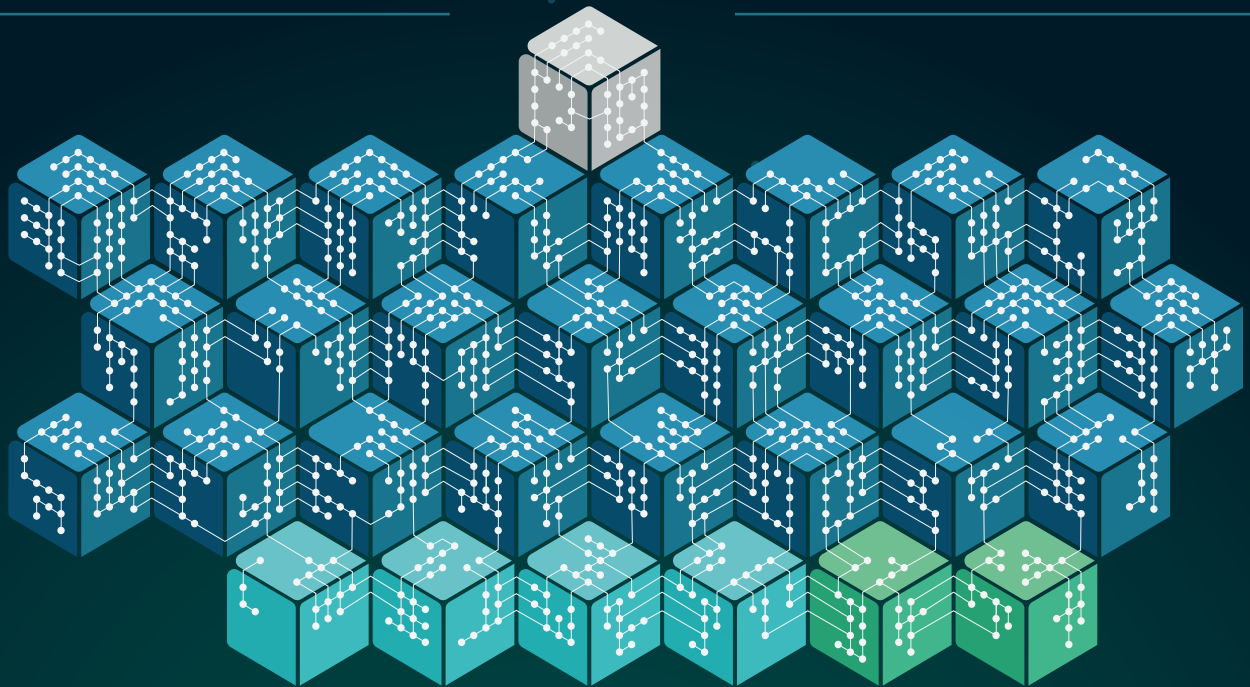
“

Figures by themselves do not trigger emotions – **impact does.**

That is why we support banks and wealth managers in incorporating ESG criteria into advisory processes, portfolio construction and analysis, and reporting in a **client- and adviser-friendly way.**

”

Learn more about our solutions by visiting aixigo.com or contact solutions@aixigo.com.



Sustainably Transforming The Financial Services Landscape



Delia Steiner

Country Manager Switzerland & Liechtenstein

aixigo AG



Based on almost 25 years' experience in the wealth management space, aixigo provides aixigo:BLOXX – a modular and flexible, fully API-based Wealth Management Platform that allows financial institutes to create individual, innovative and profitable wealth management services by enabling individual client and advisor journeys! The platform's high-performance aixigo:BLOXX provide all technological capabilities for use cases in investment advisory, portfolio monitoring and analysis, portfolio management and financial planning. aixigo has formed long partnerships with the who's who of the wealth management industry across Europe.

Trusted with over €450 billion of AUM in over 10 million portfolios by over 30 clients, international customers, such as radicant, Vontobel, BNP Paribas, Commerzbank and Hargreaves Lansdown, benefit from aixigo:BLOXX. Overall, aixigo's platform enables banks, financial service providers and wealth managers to master digitalisation and empowers them with speed, scalability, and flexibility. Our flexibly integrable and scalable solutions support the transformation of the financial landscape and drive the new wealth experience.

What was the winning formula of your firm/you that explains why you won?

The implementation of our ESG-compliant solution for the digital sustainability-focused house bank radicant exemplifies perfectly how our solution with its built-in ESG capabilities supports a variety of business cases and meets evolving client needs by even enabling hyper-personalised, sustainable investment experiences. Apart from supporting radicant's investment approach and service experience, the technological edge of aixigo:BLOXX was the key selection criterion for radicant. Looking for a modular, flexible, yet proven solution with rapid availability and high-speed data processing, aixigo's solutions for investment advice, portfolio monitoring and analysis, and portfolio management were the perfect fit for radicant.

What are you going to do to remain competitive and stay ahead?

We consistently update, refine and expand our product, the aixigo:BLOXX Wealth Management Platform, to provide cutting-edge solutions that address emerging market trends, evolving needs, and regulatory changes. Additionally, we continuously actively collaborate with our clients and partners to develop new and innovative services and use cases that leverage our aixigo:BLOXX.

Building upon aixigo:BLOXX' existing functional capabilities, our future enhancements are geared toward providing exactly those services other tools are missing through engaging in partnerships. This involves offering an expanded suite of BLOXX that reflect the latest market needs and empower wealth institutions to fine-tune their solutions with an even wider array of bespoke functionalities. This is only possible with a true open ecosystem approach that is mostly lacking in other available tools in the market.

Where do you see the wealth management industry and your part of it going in the next five years?

In the coming years, demographic shifts, technological integration, personalisation, and sustainable investing will continue to drive the transformation of the wealth management landscape. While clients will seek even more personalised and tailored investment strategies and services, the interest in sustainable and socially responsible solutions will tighten, further accelerated by wealth shifting to younger generations.

Embracing this transformation, aixigo's commitment remains steadfast. For almost a quarter of a century, aixigo's solutions have been at the forefront, empowering financial institutions to create innovative, individualised, and profitable services. Through strategic collaborations and constant enhancements, we'll adapt our platform to anticipate new market trends and regulatory shifts, ensuring it remains a driving force in the financial landscape.

Your trusted **financial advisor and global wealth planner** in Switzerland



Pierre Gabris
Founder
Managing Partner

Independent, Swiss-based global wealth management for an international clientele from over 30 countries around the world including the United States and Canada

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Fostering An Environment Where Clients Experience A Blend Of Professionalism And Familiarity



Pierre Gabris
Founder & Managing Partner
Alpen Partners AG



What contributed to your firm's success and winning formula?

As an independent Swiss wealth management boutique, Alpen Partners is dedicated to excellence in all aspects of our operations. With offices in Zurich, Geneva, Lugano, and Bäch/Wollerau (headquarters), our commitment to delivering outstanding service extends from our entrepreneurial partners to our portfolio management and award-winning private clients services team. Serving clients from over 30 countries, including the United States through our SEC-registered entity, Alpen Partners International, we customise our services to meet each client's unique needs. Our approach emphasises individualisation, tackling complex situations, and collaborating with external experts when needed. We are not only focused on asset management but also place significant importance on the wealth and estate planning aspects. Upholding our fiduciary duty, we prioritise clients' interests and maintain a disciplined and streamlined approach, consistently satisfying our clients.

How did your colleagues contribute to your success?

In the people-centric business of wealth management, the seamless collaboration among diverse team members is crucial to our success. The dynamic interplay of skills, expertise, and perspectives ensures precise navigation of the financial landscape. This collaborative spirit shapes how we engage with clients, enhancing professional capabilities and fostering an environment where clients experience a blend of professionalism and familiarity. We take pride in maintaining friendly rapport, forging long-term relationships based on trust, transparency, and a shared commitment to financial success. This collaborative ethos sets our wealth management services apart, delivering unparalleled value in a professional yet approachable manner.

What's your strategy to stay competitive and ahead?

To further our commitment to excellence, we strategically invest in building a highly-qualified team across all aspects of our business. Our meticulous recruitment process ensures each team member possesses the necessary expertise to navigate the wealth management landscape. Embracing regulatory obligations with dedication, we operate transparently and compliantly. Our core strategy involves providing individualised wealth management solutions tailored to clients' unique needs. Unlike relying on off-the-shelf products, we remain agile and innovative, staying ahead of industry trends. This approach ensures competitiveness and reinforces our ability to offer bespoke solutions aligned with clients' financial objectives while maintaining a personal touch.

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

Receiving an award is a gratifying highlight for our entire team, extending beyond individual accolades. It acknowledges the collective dedication and hard work contributing to our success, serving as a testament to each team member's efforts. Celebrating such achievements fosters pride and camaraderie, reinforcing that success is a shared journey fueled by the commitment, expertise, and collaborative spirit of every team member. These accolades inspire us to continually strive for excellence, recognising that our collective efforts significantly impact our firm's success and reputation.

AMINA

Revolutionize Your Financial Future

Unlock the full potential of your crypto assets with AMINA. Your gateway to a brighter financial future.

Empower your financial journey with AMINA
Your key to crypto control, trust, and security.



WINNER

Digital Assets Solution

AMINA Bank

aminagroup.com



AMINA Bank's Mission To Shape The Future Of Finance



Markus Menzl
Chief Commercial Officer
AMINA Bank



"AMINA Bank is one of the great Swiss financial institutions, leading us to be recognised as the best 'Digital Assets Solution' at the Eleventh Annual WealthBriefing Swiss Awards."

What is the winning formula of AMINA Bank that explains why it won?

The key to our success has been a fervent focus on our award-winning products – we are constantly iterating on our offering to provide our customers with the most secure, innovative, and effective way of getting the most out of their assets.

This award win was a testament to the success of AMINA Bank in our mission to define the future of finance, since becoming the first crypto bank to receive a FINMA licence back in 2019.

What are you going to do to remain competitive and stay ahead?

AMINA Bank is a forward-thinking business – and our recent rebrand marked our intent to continue our success story. Our progress is all thanks to my diligent colleagues whose hard work and belief in our goals have made our achievements to date possible.

To stay ahead, we want to expand on our regulated hubs in Zug, Abu Dhabi, and Hong Kong with licences in additional jurisdictions so that we can offer our services to both traditional and crypto-savvy clients all around the globe.

What sort of challenges did you surmount to reach this level and how have you succeeded in such fast-moving circumstances?

The world of digital assets is a notoriously volatile one. However, while the banking crisis of March 2023 could have derailed us, we instead received record inflows and increased engagement from new customers.

We came out on the other side of that industry-wide scare in a positive light, and are now very much on a trajectory towards greater success. We know how fast this industry moves, having been founded just less than five years ago.

Crucially, our client-focused approach has meant we've always provided a platform for investors to build wealth safely – and under the highest regulatory standards.

Where do you see the wealth management industry and your part of it going in the next five years?

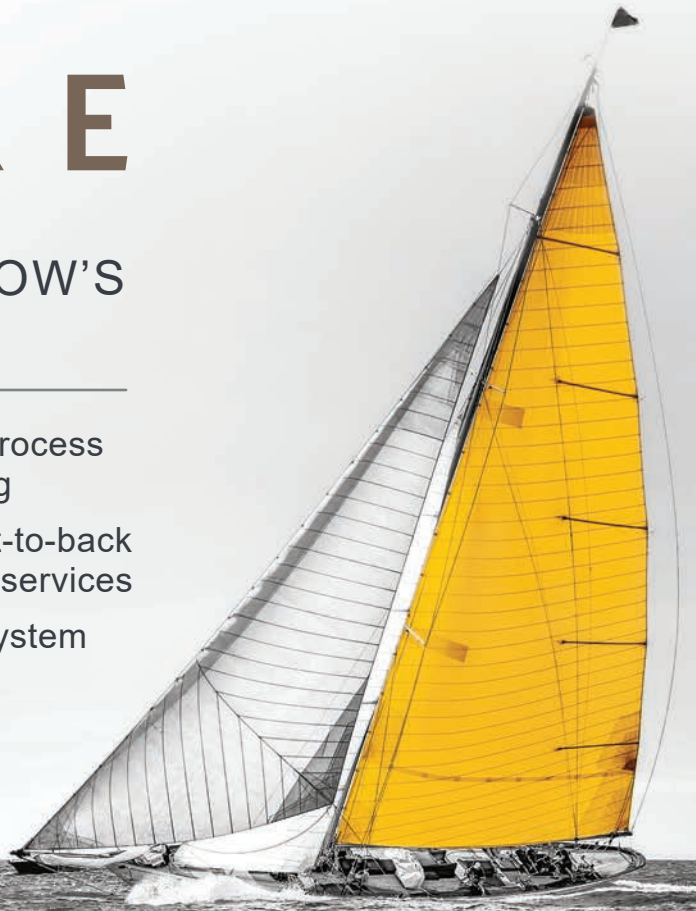
Our belief is that AMINA Bank is very much an investors' gateway to the future of finance. As a business, we are driven by perpetual change, bringing together the various compounds of traditional, digital, and crypto banking to unlock new potential and growth for our clients.

This vision and forward-thinking means that we will be the driving force wherever the wealth management sector heads next. Ultimately, our goal is to define the future of finance, driven by the desires of our customer base.

AZQORE

PARTNERS FOR TOMORROW'S WEALTH MANAGERS

- In-depth banking expertise
- Leading edge technological approach
- Software as a Service (SaaS)
- Business Process Outsourcing
- Digital front-to-back products & services
- Open ecosystem connected to Fintechs



Key figures



+30

YEARS
OF EXPERIENCE



+200

BILLION AUM
(15% IN ASIA)



+750

EMPLOYEES



+25

BANKS

across

10

COUNTRIES

AN **INTERNATIONAL** PRESENCE
THROUGH OUR OFFICES

■ SWITZERLAND

SINGAPORE ■

A Strong Focus On Customer-Centric Services



Stephane Gomis
Deputy Chief Executive Officer
Azqore SA

Based in Switzerland, Azqore is a digital service provider specialised in the outsourcing of information systems and the processing of banking transactions for private banking players. For nearly thirty years, Azqore has been offering Software as a Service (SaaS) innovative solutions to transform, digitise and improve the client experience of private banking players.

Azqore serves today 25 clients in Europe and Asia totaling approximately CHF 200 billion in assets under management with proven experience of numerous migrations. Azqore is a subsidiary of Indosuez Wealth Management (the global wealth management brand of the Crédit Agricole Group and a leader in the field) and Capgemini (a global leader in consulting, technology services and digital transformation). With the support of these two shareholders, Azqore can combine in-depth banking expertise with a leading edge technological approach.

What was the winning formula of your firm/you that explains why you won?

Our Business Process Outsourcing (BPO) solution provides a customisable and comprehensive set of tools, processes and services to manage all banking operations. The teams of approximately 200 dedicated banking experts operate across two dedicated centers, in Switzerland and Singapore, enabling a follow the sun approach. By being specialised by area of expertise, the back office teams can process each clients' transaction efficiently within an anonymous and highly secured environment.

Regulatory requirements are implemented as they arise, thus offering an integrated, comprehensive and regularly tested environment. Highly automated processes, including RPA automation, combined with proven control architecture, enable teams to achieve top quality and optimal productivity.

Independent audits are performed regularly to acknowledge the robustness of the operational risk management & control framework. These audits comply with ISAE 3000/3402, ISO 9001 and OSPAR (Singapore) standards.

Please describe how your colleagues made a difference?

With Azqore, the clients benefit from several differentiating factors on the BPO solution:

- **Efficiency:** Processes industrialisation with track record of handling diversified, complex products and processes, which require continual flexibility.
- **High-quality & risk management:** Quality awareness and long-term thinking as well as strong risk culture through strict and tight quality control. Global coordination, aligned processes throughout the operational centers.
- **Excellence and in-house expertise:** We're an incubator for high-potential talents, recognised for their technical excellence, and growing stronger every day in a playground where exciting challenges are our daily bread.

- **Valued partnership:** Direct contact between Azqore's operations team and the client's middle office, working hand-in-hand to facilitate your business growth.

Furthermore, our strong focus on customer-centric services distinguishes us from the rest. We prioritise our clients' unique needs, offering tailored solutions and personalised support. This commitment to understanding clients and going the extra mile to ensure their success makes Azqore a trusted partner in wealth management.

Where do you see the wealth management industry and your part of it going in the next five years?

Our business has a single purpose: to support tomorrow's private bankers and wealth managers as they adapt to a fast-changing world. With regulatory evolution becoming ever more complex (ESG, cyber security, customer protection, etc.), combined with the increased need for effective digital solutions and the ability to manage properly their data, our customers are looking for constantly evolving IT platforms with a sophisticated user experience.

With its 30 years of experience, Azqore is well positioned to be the go-to partner for private banks and wealth managers, which have a need for digital and operational transformation. By staying at the forefront of digital advancements, we empower our clients to thrive in an increasingly competitive landscape.



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both your
personal and
corporate
needs.



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INTERNATIONALE
À LUXEMBOURG
| SUISSE

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Rémy Savoya

Head of CIB

Hartmut Vollmer

Head of Wealth Management

Banque Internationale

à Luxembourg (Suisse)

What was the winning formula?

[Rémy]: Our strategy is centered on entrepreneurs and families; we aim to support them in achieving both their personal and business aspirations in an increasingly complex and fast changing world. We do so with an unwavering focus on our clients. We invest time and effort in understanding our clients' needs and based on this, our team of experts come together and deliver tailor-made solutions. In short, we do not sell products, we craft highly curated solutions.

[Hartmut]: As Rémy mentioned, we want to focus on helping clients meet their business and personal needs. As a boutique bank, all our teams work closely together and our clients have access to all the experts needed to achieve the client's goal; and I do think this is unique, our clients can come to one place and be advised on a M&A transaction and also get a mortgage on a private property.

What are you going to do to remain competitive and stay ahead?

[Hartmut]: One of our key success factors is our people. As mentioned before, all our clients have direct access to several experts; and we know that our teams and our people are at the center of what we do and what we offer. That is why this year we have onboarded several well-seasoned professionals; and we will continue to do so in the next months and years ahead.

[Rémy]: I agree, at BIL Suisse, we are big enough to matter but small enough to care. It may sound cliché, but we are a systemic bank where clients are able to work directly with the decision makers. Each of our clients is supported by a very experienced team of bankers from a diverse background: this is only possible by having the right people and teams on board that then collaborate effectively.

Where do you see the wealth management industry and your part of it going in the next five years?

[Hartmut]: The last few years have shown us that anything can happen. For our industry, this means that we must be more agile than ever. At BIL Suisse we pride ourselves in the agility of our set up, which allows us to service our clients efficiently. So, in the next five years, this is our focus, to be able to change and keep accommodating to our client needs.

[Rémy]: It is clearly a growing and fast changing market, which can be exciting or unnerving for our clients, colleagues, and partners, but some factors remain unchanged: common sense, critical thinking, trust in relationships. So, what makes us different is our human touch and capabilities. We want every client that comes to BIL Suisse to know that they will have all the capabilities needed at one place and a dedicated team of professionals. So while we continue enhancing our digital capabilities to create a seamless experience, in the heart of our business remain the people, the human touch and the teams who care about every single client.



Winner

- **Client Service**
- **Women in Wealth Management (Individual)**



For the future...

We're for future. For the days, decades and generations ahead. For preserving, growing and sharing your wealth. For making the most of your business and caring for your family. For whatever happens next – we're here for you.

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Innovative Strategies And Teamwork: The Key To Success In The Evolving Wealth Management Industry

What was the winning formula of your firm/you that explains why you won?

It's a mix between being able to cope with the regulatory changes, offering innovative solutions to our clients and having a very dedicated team offering cutting edge services to our External Asset Managers (EAMs).

The partnership we signed last year with Wize by Teamwork illustrates this perfectly; our willingness to differentiate ourselves and to offer very pragmatic, unique, simple and innovative solution to cater the needs of EAMs.

Please describe how your colleagues made a difference?

I strongly believe that in the EAM industry, it's the team which makes the difference, ultimately allowing us to attract new EAM and grow our AuMs.

"One person cannot make a difference, but a strong team, working together towards a common goal to better serve our professional clients, that makes a real impact."

Moreover, being an agile boutique bank, family owned, and family run with easy access to our specialists, top management and to the founding family makes a very unique combination.

What sort of challenges did you surmount to reach this level and how have you been able to succeed in such fast-moving circumstances?

Our main challenge was technology and digitalisation. Therefore, we moved quickly with our partnership with Wize by Teamwork an idea that I had discussed for a long time with Pierre Dupont, Managing Partner at Wize by TeamWork.

I received the full support from the Executive Committee and Nicolas Syz when I came to them with this idea, and we managed to achieve this project in a very timely fashion. This demonstrates our capacity to move quickly and take strategic decisions as an organisation.

Where do you see the wealth management industry and your part in it going in the next five years?

I believe this industry will continue to consolidate. We had a very big consolidation last year with Crédit Suisse, which was forced to merge with UBS. I think the consolidation is not over, particularly in the EAM industry.

We didn't see much M&A activity after the new FINMA regulatory framework and licencing process, but I am convinced this will take place in the next 2-3 years.

Nevertheless, I believe the share of the AuMs in Switzerland managed by EAMs will continue to grow in the next five years.



Etienne Billaud
Head of External Asset Managers
Syz Bank



Winner

- **Overall Platform for External Asset Managers**
- **Outstanding Contribution to Wealth Management Thought Leadership (Individual)**



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Barclays Switzerland: Putting People At The Heart Of Leadership



Rahim Daya

CEO

Barclays Private Bank



Winner

• **Private Bank Leadership Team**

Barclays Private Bank provides a full-suite of specialist investment, banking, lending and wealth advisory solutions to the world's most influential people and their families in 40 countries through our global network of private bankers.

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What was the winning formula of your firm/you that explains why you won?

Barclays is now one of only two British banks in Switzerland, and we are proud to bring our British heritage to Switzerland, the home of international private banking and a region important to the Barclays Group.

I believe a key differentiator for us is our full-service offering and particularly our ability to draw on the breadth of skills and knowledge across the entire Barclays Group.

We have a very strong and stable team in Switzerland. The leadership team believe having common goals across the business is important – we ensure that all members of the organisation are part of the same story and for us, across all markets, it's about growth and providing our clients with excellent service. This means that all our initiatives are linked to this common goal and everyone is rallying behind it.

What sort of challenges did you surmount to reach this level and how have you been able to succeed in such fast-moving circumstances?

There are always challenges, for instance, I took on the role of CEO Barclays Suisse during the Covid-19 pandemic and since then we have seen further geopolitical instability. As a business we are constantly evolving and adapting, and with challenges come opportunities, both for colleagues and for clients.

How do you hope your firm will benefit from getting this award?

I want to emphasise that this achievement wouldn't be possible without the incredible hard work and support of my dedicated colleagues, I am grateful for their exceptional efforts. Accolades such as these acknowledge the relentless pursuit of our goals and signify the validation of industry peers and stakeholders, affirming that we are on the right path. We've seen significant growth over recent years and I am confident we can continue on the same trajectory.

Where do you see the wealth management industry and your part of it going in the next five years?

Today, banks need to be able to provide clients with bespoke solutions wherever and whenever they need them. Banking and investing are more complex than ever, and clients want access to the full capabilities of Barclays no matter where they are in the world at a certain point in time. Just as clients' needs evolve so too does technology, and Private banks all over the world will need to continue to invest significantly into digital capabilities and this is exactly what we are doing at Barclays. In addition, we are seeing that new generations do not want to be treated as their parents were, they do not want to inherit the risk profile of their predecessors. They seek a more agile, attentive bank, willing to share ideas. We offer them not just a single point of contact but multiple interfaces with various expertise. Clients should feel that the entire bank is working in their service.

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Enabling Families To Transform Capital Into Impactful, Life-Enhancing Wealth



Maurice Ephrati
Managing Partner
Bedrock SA



Winner

• **Private Investment Office/
Multi-Family Office**

Bedrock is a multi-family office that was established in 2004 in Geneva and is regulated by the Swiss regulator, FINMA. It now operates from Geneva, London, and Monaco, and oversees more than SFr5 billion for families and institutions. The founding partners have more than 20 years of experience working together. Services cover portfolio management, private market investments, family strategy and governance solutions, and handling of day-to-day affairs.

What was the winning formula of your firm?

Our winning formula comes down to our client-first philosophy. We understand that everyone sees wealth differently, and so we take the time to see each client's unique point of view and to get to the heart of what matters most to them. At the centre of how we work is helping families explore the different forms of capital, whether that's helping with the knowledge and experience to support their decision-making (intellectual capital), helping to create strong connections between family members and the wider world (social capital), or helping families finance their needs and future aspirations (financial capital).

Our mission is to help clients become clear about their values and the purpose behind their wealth, offering them financial and non-financial solutions, so that they can transform their capital into impactful, life-enhancing wealth. On top of this, a key differentiator is that our founders and their families' invest alongside our clients. This ensures alignment of interest and guarantees that the service our clients receive is as good as we give to our own families.

Please describe how your colleagues made a difference.

This award reflects the hard work and dedication of our team members. Our team's core efforts are guided by our values -

authenticity, dedication to our people, and an unwavering commitment to deliver excellence. These serve as guiding principles, shaping our interactions with clients and the decisions we make.

Our commitment to creating impactful-life enhancing wealth goes beyond just the families that we work with. It is ingrained in our internal company culture. Many of our team members have been working together since the very beginning of Bedrock, and our three founding partners also remain actively involved in the day-to-day running of the business. This long-term commitment and continuity contribute to the stability and consistency that our clients rely upon. As we approach our 20th anniversary, we are now more than ever, dedicated to our people; whether they are clients, employees, business partners, or the wider communities we operate within.

What will you do to remain competitive?

We are proactively anticipating and addressing potential changes in the financial landscape that may affect our clients. We launched a new impact portfolio to cater to the rising demand for purpose-driven investments. Our dedication to offering an unparalleled 360-degree view of wealth remains a top priority. We continue to provide transparent and detailed reports on investment performance across all assets, even those not directly managed by us, ensuring our clients are well-informed to make strategic decisions about their wealth.

Empathising with our clients and understanding their unique needs and challenges, we sit on the same side and protect their interests as if they were our own, ensuring they receive the best service from us and any third parties they contract with. Furthermore, we are focused on enhancing the client experience through offering exclusive events and networking opportunities that add value, build a sense of community, and allow our clients to connect with each other and some of the sharpest minds from across our network.

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Digital Market Player With The Ability To Adapt



Julien Faure-Geors
Chief Risk Officer
CBH Compagnie Bancaire Helvétique



Winner

- **Customer Facing Digital Capabilities**
- **Most Innovative Client Solution**

What are you going to do to remain competitive and stay ahead?

It is no secret that it is really tough to remain competitive in this over-banked environment. But we believe we have a fair chance with our strategy of in-house development, crafting every aspect of our technology with precision and tailoring them to the rapidly evolving needs of our clientele. Anticipation and proactivity are key to stay on top of emerging technologies. It also means that we are on a path of continuous learning, investing in the professional development of our teams and trying to stay ahead of industry trends. We believe that this commitment to innovation and adaptability positions us as one of the more dynamic players in the market.

What type of challenges did you surmount to reach this level and how have you been able to succeed in such fast-moving circumstances?

Meeting the challenges of our fast-paced industry requires a combination of strategic vision, resilience, and agility. The fact that our work culture is very much non-hierarchical with an open-door and minimal-meetings policy, and that we have chosen an in-house development strategy, fosters this agility because we can respond quickly to change and adjust our solutions almost on the go.

The people who work here have a strong ability to adapt and bounce back, which is essential to our culture and probably the cornerstone of our success. The cohesion of our teams plays a critical role in turning obstacles into opportunities.

How do you hope your firm will benefit from getting this award?

First, we will enjoy the win and congratulate the teams on this achievement. It means a great deal to us. Being judged by industry peers and being rewarded at the end of the process is very motivating. It serves as a confirmation that we are on the right track with our continued digitalisation efforts and that our chosen business model is a sustainable option. Beyond that, we hope that it will enhance our reputation in the marketplace and strengthen the confidence of our clients and prospects in our services and capabilities. We hope that this increased visibility will open doors to new opportunities, attract top talent and foster collaborations that will contribute to our continued growth.

Where do you see the wealth management industry and your part of it going in the next five years?

Over the next five years, we see the wealth management industry undergoing continuous change. This is inevitable. On the one hand, we have the global acceleration of digitalisation in all sectors, and on the other hand, we have tighter regulations in the financial industry and more knowledgeable clients. To continue to deliver outstanding digital services to our clients in the future, we see our biggest challenge as the integration of regtech (i.e. the use of advanced technologies in daily operations). The automation of regulatory and compliance processes will not only improve our efficiency for clients, but it will also have a positive impact on the day-to-day work of all team members. From where we stand, the future landscape of private banking services is one where digital interactions are seamlessly integrated with personalised financial strategies.



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Lifetime Achievement Award 2024



Joseph Benhamou
Member of the Board of Directors
CBH Compagnie Bancaire Helvétique



Winner

• **Lifetime Achievement**

"I am extremely honored and humbled to receive the Lifetime Achievement Award from WealthBriefing. This recognition is a time for me to look back on the incredible journey and accomplishments that everyone at CBH has achieved. I'd also like to thank all my colleagues for the great memories we've made together over all these years."



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How ERI Supports Wealth Managers In Navigating And Adapting To A Complex Compliance Framework



Jean-Philippe Bersier
Director of Sales & Marketing
ERI



What was the winning formula of your firm that explains why you won?

ERI's OLYMPIC Banking System empowers private banks and wealth management firms to modernise their business models, swiftly deliver innovative products, and offer personalised digital services, all while effectively managing costs and risks. By achieving these objectives, we support our clients in their digital transformation journey, ensuring the future resilience of their operating models and growth strategies. In today's dynamic regulatory landscape, maintaining an effective compliance framework presents a significant challenge. It demands a multi-faceted approach to seamlessly adapt to regulatory changes and integrate them into front-to-back processes. Compliance with evolving local and international regulatory requirements often entail time-consuming manual processes.

To address this challenge, a technology platform with sophisticated embedded compliance functionality and an open architecture becomes indispensable. It provides access to a diverse ecosystem of regulatory partners via API connectivity, facilitating our commitment to seamlessly integrate and automate workflows. ERI continues to invest in the OLYMPIC Banking System, empowering banks to minimise manual processes and reduce the risk of errors by automating key processes such as AML, KYC, fraud sanctions screening, transaction monitoring, and reporting. We firmly believe that this flexibility is essential for wealth management professionals to remain competitive while effectively mitigating reputational and operational risks.

What are you going to do to remain competitive and stay ahead?

Carefully observing market anticipations for enhanced functionalities forms the foundation for creating solution-oriented

tools, empowering our clients to establish efficient and transparent workflows. While simplifying complexity is a key component of this success, it is equally vital for private wealth managers to have real-time access to their clients' data. This enables managers to proactively understand their clients' requirements, delivering the personalised approach sought, and empowering decision-making processes through digital tools like our digital banking platform.

Who inspires you, either inside or outside your organisation?

Our approach to consistently investing in the development of novel product functions and features is intricately guided by the invaluable feedback from our clients. Prioritising their operational needs for daily efficiency and innovation is pivotal in ensuring that our solutions align seamlessly with market expectations.

Our clients not only serve as a wellspring of inspiration but also as collaborative partners across all functions. It is through this collaborative effort that we strive to deliver optimal solutions, drawing on the collective expertise and dedication of our team.

How do you hope your firm will benefit from getting this award?

Winning an award in the compliance category signals to clients, partners, and stakeholders that ERI as a company excels in ensuring that its clients adhere to regulatory standards and best practices by embedding and automating regulatory constraints into workflows.

This award contributes to further build trust, in an industry where compliance is of utmost importance. Finally, this award underlines our commitment to supporting our clients in navigating the complexities of regulatory compliance and driving sustainable growth in the digital era.

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Global Private Banking

HSBC's Unrivalled Dedication To Clients

At HSBC Global Private Banking, we aim to bring the very best of the HSBC Group to our most valued clients. Our global network, combined with extensive local market knowledge and expertise sets us apart allowing us to connect clients to tailored growth opportunities around the world.

We are experts in creating sophisticated, bespoke offers for Ultra-High-Net-Worth (UHNW) clients, where Switzerland is our center of excellence across Europe, the Middle East and Africa. We are proud of our two award wins this year which recognise our leading positioning in the market, and the positive impact of our growth trajectory.

The awards are further testament to our leading, **best-in-class offer for UHNW clients** where we successfully deliver the entire HSBC platform across public and private markets. We have a sophisticated offer with the full continuum of products, including tailored and non-traditional wealth-management solutions such as private credit, strategic equity and over the counter solutions.

In Fixed Income, we are proud to have won for the second consecutive year, a testament to the strength of our **bespoke fixed income advisory offer**, where we are uniquely positioned to deliver innovative solutions and an exceptional service to our clients worldwide. 2023 saw Fixed Income coming back to the centre of clients' attention where we showed it could represent an attractive opportunity if deployed in the right way. Fixed Income is part of the DNA of HSBC, with our leading research and Debt Capital Markets platform, complemented by our private bank which boasts a market leading array of Fixed Income solutions. This includes our distinct advisory portfolio services that combine both an institutional expertise and the highest level of customisation for our clients. Combined with our focus on connectivity, innovation and servicing, we grew our assets under management in our Fixed Income Advisory business by over a third last year.

When it comes to delivering for our clients, we go the extra mile. Our winning formula is a combination of our teams, our network, our strength and innovation.

Our teams: Our teams are our number one asset and the foundation of our success. We have been proud to significantly grow our franchise across Switzerland, Europe and the Middle East over the past 12 months, bringing in world-class talent to complement our expert teams. Our fine combination of collaboration, trust, and expertise are all directed towards delivering the best offer and service level in the market. Our teams are committed to ensure a specialist and dedicated service for each client, offering comprehensive advice tailored to specific needs.

International Connectivity: Our Swiss Private Bank opens up a world of opportunities for our clients, as part of a global, universal bank spanning 62 countries worldwide. We bring to the table HSBC's extensive capabilities in asset management, corporate banking and investment banking, which in collaboration with our Global Private Bank means we can offer clients a holistic view of their wealth to help them balance both their business and personal wealth needs. From our specialist advisors to our financing and investment solutions, we help our clients define a long-term vision for their wealth.

Innovation: We are uniquely positioned to bring new, innovative solutions to our Ultra-High-Net-Worth client; solutions that cannot be found elsewhere. We have developed a leading investment platform, with leadership in areas including Lombard Lending, Alternatives and Advisory services.

This professional expertise, combined with our significant and strong capital base allows allow us to find unique opportunities to work hand in hand with our clients to grow, preserve and manage their wealth - now and for generations to come.



Karl Faivre
Head of IWS EMEA &
Switzerland, Global Lead for
UHNW Solutions Group
**HSBC Global Private
Banking, Switzerland**



Winner

- **UHNW Team (International Clients)**
- **Fixed-Income Investment Strategy**

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Shaped by more than 145 years of experience supporting families and entrepreneurs around the world, Indosuez Wealth Management offers in Switzerland via its Swiss entities a tailor-made approach that allows their clients to build, manage, protect and pass on their wealth according to their goals and ambitions. In coordination with the Crédit Agricole group, their employees are committed to addressing environmental, social, and governance issues to pursue consistent progress and ceaseless value creation. Indosuez Wealth Management is the global wealth management brand of the Crédit Agricole group and is present in Switzerland via CA Indosuez (Switzerland) SA and CA Indosuez Finanziaria SA. As a whole, the Indosuez Wealth Management group is present in 11 locations and counts more than 3'000 employees.

CA Indosuez (Switzerland) SA
4, Quai Général Guisan - P.O. Box 5260 - CH-1211 Geneva 11

ca-indosuez.ch

CA Indosuez Finanziaria SA
3, Via Ferruccio Pelli - CH-6901 Lugano

CA **INDOSUEZ**
WEALTH MANAGEMENT

A Human-Centric And Innovative Approach: Indosuez's Strategy For Success



Marc-André Poirier
CEO
Indosuez Wealth Management



Winner

- **FX Solution Provider**
- **Corporate Social Responsibility/Diversity Programme**
- **Impact Investing**
- **Insurance Offering**

What was the winning formula of your firm that explains why you won?

At Indosuez, our unique offering is our people. Our multi-disciplinary and highly specialised teams help families, entrepreneurs, associations and foundations manage, protect and pass on their wealth. Our commitment to CSR, philanthropy and compliance are drivers of continued progress, adding to our singular positioning and our excellence in relationship banking.

We pride ourselves in living the guiding principle of the group – “working every day in the interest of our customers and society.” We have an in-depth knowledge of our clients at a local level combined with a global reach. This allows us to offer a comprehensive product range and provide a global investment strategy with a high degree of customisation for individual clients.

This is evident in our life insurance offering, for which we won ‘Best Life Insurance’ at the *WealthBriefing* Swiss Awards. We focus on quality insurance partners, employing an open architecture approach and collaborating with globally renowned market leaders. We are proud to be a part of the Crédit Agricole Group, a universal banking group which has integrated life insurance into its offerings for several decades, owning several insurance companies. This extensive expertise allows us to vertically integrate life insurance, from distribution to product offerings.

Please describe how your colleagues made a difference?

Our colleagues are proud to go above and beyond to serve our clients, and to act as “a good citizen” within our local markets. Indeed, 2023 marked the twelfth year of our Citizen Days projects, which form part of our global CSR policy and provide an opportunity for action and new encounters between employees and the associations supported by the projects.

In 2023, the Indosuez Foundation in Switzerland worked on 16 projects across four cities (Geneva, Zurich, Lausanne, and Lugano) and in conjunction with 13 associations. More than 200 employees took part in the 2024 initiative, a record-year!

What are you going to do to remain competitive and stay ahead?

We are constantly innovating to improve both client and employee experience. In 2023, we launched a new ideation challenge focused on sustainability – where we develop ideas from colleagues and set them collaborate with startups to make them a reality.

In terms of client innovation, we created a new product to support ocean conservation in partnership with Crédit Agricole CIB. Indosuez Blue Cycle is dedicated to protecting oceans by issuing green notes with a focus on financing projects advancing the environmental transition. The product also includes a solidarity component in the form of a monetary contribution donated to Plastic Odyssey, the Fondation de La Mer, and the oceanographic Institute of Monaco. In total, over 430,000 euros has now been donated to these three organisations.

On another note, we are able to offer innovative FX and precious metals solutions to our clients. We created unique products that differentiate us and allow clients to benefit from the market conditions, while at the same time protecting their capital.

Thanks to our open architecture platform, we can source prices from various counterparties which bolsters our competitiveness and guarantees an optimal service for our clients.

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Winner

• **Alternative Fund Manager**

Manuel Garzelli
CEO
ITERAM Capital

What was the winning formula of your firm/you that explains why you won?

I wouldn't say there's a formula; rather, it involves maintaining consistency in setting high standards and focusing on common goals. It's more of a mindset of embracing opportunities. For context, ITER (as in ITERAM) means 'the path', which, I believe, perfectly represents the long journey of an asset manager like us.

It's relatively easy to navigate on a long, straight line, but more challenging when the road is bumpy and strewn with obstacles. We focus on staying the course while remaining prepared for the challenges ahead.

Please describe how your colleagues made a difference?

ITERAM was founded in 2015 by former directors of Edmond de Rothschild. Our team now comprises a well-balanced combination of former senior employees from EdR and individuals with diverse backgrounds and solid expertise in both operations and investments. We have fostered a robust internal culture without imposing it.

As a boutique asset manager, everyone at ITERAM has the opportunity to play a role in its success and make a meaningful contribution. We have built a team that shares similar values and vision. It is a collective journey, and we can take pride in what we have accomplished so far.

What are you going to do to remain competitive and stay ahead?

Although we can't rely on permanent capital, we always strive to think ahead and stay on top of long-lasting trends in alternative and private markets. This involves building strong and long-term relationships with our clients and partners. A notable example is the launch of our direct private debt strategy, established almost seven years ago when it wasn't a hot topic as it is today.

The venture capital strategy that we launched two years later with a dedicated team also exemplifies the capabilities we have developed to be proactive and provide our clients with a differentiated offering in the alternative space. We are continually exploring ways to grow, and I wouldn't be surprised to discuss with you a new strategy launch next year.

How do you hope your firm will benefit from getting this award?

While this recognition is not an end in itself, we cannot deny that it is a fantastic acknowledgment for the hard work accomplished by the entire team. For a boutique asset manager like us, despite having an established track record, this underscores the constant commitment for excellence.

Winning this award for the second year in a row ultimately lends additional credibility and as much legitimacy as any other larger player, especially in a competitive industry like ours. It is also a great success for our clients and partners, and I hope this will serve as an encouragement for other potential investors to take a closer look at our alternative offering.

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Organic Growth And Commitment To Diversity Leads The Way



Carmen Kiavila
Founder
Kiavila Avocats



What was the winning formula of your firm that explains why you won?

Audacity. The audacity, to open a successful law firm, on my own, after having experience in auditing and consulting in the financial services industry in Switzerland.

The audacity to think that a young black French woman can fulfill her ambitions between Switzerland, France, and Africa with her agenda. My training is a mixture of HEC Paris and top French law schools, which helps me to be more aligned with my client's needs. We are reactive, close to our clients, and visible in the media and conferences. I also promote diversity; I have a nonhomogeneous team because it is the best approach to making better decisions.

Please describe how your colleagues made a difference.

The diversity of their backgrounds. At Kiavila Avocats, we praise ourselves for thinking about diversity holistically. Diversity is not only a question of gender, skin color, or age, even though these questions must be seriously addressed in companies.

Diversity is also a question of backgrounds and is seen to achieve our business successes. Our mottos are flexibility, agility, usefulness, and curiosity.

What will you do to remain competitive and stay ahead?

I constantly reframe my experiences to bring them out in my company. Although we face some challenges, we keep asking ourselves what we can do to ensure our success. We build up opportunities for now and for the future, and one of my challenges is to keep boosting my employees' engagement. We must not take the awards received between last year and this year for granted. We work on the customer experience, our identity, and our favorite subjects, which are still taxation and tech law (which includes digital law, AI, and data protection...).

What challenges did you surmount to reach this level, and how have you succeeded in such fast-moving circumstances?

I had so many negative comments when I decided to open my firm. The reason was that these commentators referred me to their anxieties and missed opportunities, which didn't correspond to my reality. Ultimately, I listened to myself and confidently thought I would gain invaluable experience and knowledge through building up my firm, regardless of the outcome. You never have a recipe for the positive things you achieve. However, I believe that my temperament, adaptability, and hard work have all played a role.

Who inspires you either inside or outside your organisation?

Gisele Halimi was one of the best among us.

How do you hope your firm will benefit from getting this award?

This award recognises our achievements and means a lot to me. It will help us emphasise our service's uniqueness and consider my leadership role. Black women are underrepresented in occidental law firms' top management; it is essential to stand for this. This prestigious award will attract new talents, increase our visibility, and encourage us to publish more articles. This award sets the bar high and obliges us.

Where do you see the wealth management industry and your part of it going in the next five years?

Tech is already included in investment decisions, but the future of wealth management will be tech, alternative, and more disruptive. We encourage the industry not to wait to be innovative. And we will be a crucial player in these areas. We are already working with several family offices and asset managers who have grasped the scope of this reality, and we intend to continue.



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Anke Bridge-Haux
CEO LGT Bank Switzerland
LGT Private Banking

LGT Private Banking is a leading international private banking and asset management group owned by the Princely Family of Liechtenstein. Anke Bridge-Haux, CEO of LGT Bank Switzerland, delves into the essence of entrepreneurial spirit, trust, and resilience, and why it is more important than ever to focus on the expectations of the next generation of clients.

What is the winning formula of your firm that helped you win these awards?

A strong pillar of our success is our unique ownership structure. LGT is owned and managed by a family that has proven their strong entrepreneurial spirit for generations: They have been thinking and acting for the long term, but always with a keen sense of new, forward-looking innovations and developments. At the same time, the family themselves are clients of the bank. This creates a unique alignment of interests between LGT and our clients, fostering long-term trust and loyalty. In addition, our many years of experience with the Princely Family have taught us what wealthy families and entrepreneurs need and how we can support them in achieving their goals. Another important factor, especially in an uncertain environment, is our high degree of resilience and stability. This stability is based on a strong business model, a strong management and team, and a strong culture of respect, trust, open communication, and transparency.

How have your colleagues made a difference?

When it comes to financial matters, trust, and deep personal relationships play an important role. And perhaps even more so



Winner

- **UHNW Team (Swiss Domestic Clients)**
- **Private Bank in Liechtenstein**
- **ESG**

in private banking. That is why we attach great importance to our relationship managers being able to build and maintain a sustainable, respectful, and long-lasting relationship with their clients. Attractive and fair working conditions go hand in hand with a high level of motivation, initiative, and loyalty on the part of our employees.

Just as crucial is an active and open collaboration between the relationship managers, who are in direct contact with our clients, and our investment experts. Only when this collaboration is well established, and everyone is pulling in the same direction can we find the best solution for our discerning clients. This is what we strive for, and the positive feedback from the *WealthBriefing* judges confirms that we are succeeding.

What are you going to do to remain competitive and stay ahead?

We will continue to pursue our strategy and the paths that have brought us success in the past. At the same time, we need to focus on tomorrow and beyond, and ensure that we are well positioned to meet the challenges of the future. Over the next few years, more and more members of the baby boomer generation will transfer their wealth to their children and grandchildren who will have different expectations of their bank, their banking relationships, and their investments. That is why we are addressing this issue at an early stage and actively engage with the next generation to learn about their needs and their expectations.



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30+ years of making legacy count



Expertise matters

To design and deliver innovative insurance-based wealth planning solutions, people truly matter. And that's where we come in. Our international team of 450+ experienced wealth structuring specialists, subject-matter and technical experts consists of over 40 different nationalities speaking over 30 different languages. We have the experience and local knowledge to engage with our clients and partners in their native tongue with an understanding of regional cultures, needs and requirements. This enables us to provide a truly bespoke service on an unparalleled scale, underpinned by expertise and knowledge. We are the right people to talk to.



Wealth Briefing **SWISS**
AWARDS 2024

WINNER
Wealth Planning Team

Lombard International Assurance

Lombard International Assurance has been awarded Best Wealth Planning Team for the second year running at the Wealth Briefing Swiss Awards 2024.

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lombardinternational.com

Lombard International Assurance Knows What Matters In Building Lasting Legacies



Robert McIntyre
Head of Wealth Structuring & Product Development
Lombard International Assurance



Please explain what you think makes your company successful in its field?

Lombard International Assurance is the leading European provider of insurance-based wealth, estate, and succession planning solutions for upper affluent, high net worth (HNW) and ultra-high net worth (UHNW) individuals, families and institutions. We design multi-jurisdictional unit-linked life insurance (also known as Wealth Assurance or Private Placement Life Insurance globally), with a deep understanding of local regulations, cultures, and requirements.

Our solutions offer flexibility, portability, one of the strongest protection regimes in Europe and a very large investment universe, including non-traditional and alternative assets.

Please describe how your team makes a difference?

Based out of Luxembourg, our Wealth Structuring Solutions department includes a team of 37 experienced lawyers, tax and estate experts, actuaries, and insurance and investment professionals, tasked with the creation and maintenance of the solutions we deliver across 20+ markets. The team is a unique and critical component in enabling the business to structure several billion euros of client wealth year-on-year.

The team delivers technical expertise into the design, development and maintenance of new products. We also have a unique expertise in integrating non-traditional assets in our solutions, such as private equity.

We have a multidisciplinary approach, bringing in the experts from our ecosystem. Working in tandem with a preferred ecosystem ensures we cater to our clients' wealth planning objectives safely.

We have active business relationships with 800+ investment managers and 200+ custodian banks across Europe and beyond.

How are your company and your solutions positioned in the wealth management industry?

We are uniquely positioned at the intersection of private banking, asset management and insurance. We are in a privileged position to further wealth management practices and we partner with clients' trusted advisers, whether they be private banks, family offices, independent wealth and/or financial advisers, tax lawyers, investment managers, etc., providing them with a unique platform to structure, protect and invest their clients' assets in a sustainable way and to grow and pass them on over generations.

Why are your solutions relevant in today's world?

The theme our international wealth structuring team is now seeing is the increased level of external complexity juxtaposed with many (U)HNW families wanting simplicity and flexibility. On the other hand, some clients may have simpler needs and requirements, which we can also cater to with the same level of service and operational excellence. Our solutions simplify the client's situation whilst also reducing potential headaches for the wealth manager and the financial adviser.

International recognition in common and civil law ensures they give the highly mobile global families peace of mind that they may use the solution to solve wealth planning challenges across borders. Our solutions have the ability to hold a wide range of assets, allowing for open architecture and existing private bank and asset management relationships to be maintained. They can also complement structures such as trusts and can be combined to future-proof current structures or enhance the estate planning.



engine.

The hummingbird is part of a powerful natural engine, essential for driving food production.

A key pollinator, it pollinates every kind of tree from avocado to banana.

We need real assets solutions that invest in the regeneration of the natural world so pollinators can thrive.

Creating stronger crops, more resilient supply chains and more investment opportunities.

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PRIVATE CLIENTS
ASSET MANAGEMENT
TECHNOLOGY



Success Through Commitment To Excellence And Innovation

What are you going to do to remain competitive and stay ahead?

We continually invest in our proprietary platform, G2 (currently being upgraded and evolved into GX), enhancing operational efficiency, security and client experience for our institutional clients, external asset managers and financial institutions.

By leveraging technologies and data analytics, we deliver innovative solutions that meet clients' evolving needs, ensuring a seamless and secure digital banking experience.

Our client-centric philosophy ensures that our offering is tailored to our clients' requirements. This allows them to benefit from innovative solutions designed to meet a wide range of financial needs.

What sort of challenges did you surmount to reach this level and how have you been able to succeed in such fast-moving circumstances?

We have a dynamic strategy focused on balancing technological innovation and functional enhancements. Through our 7-year GX programme, we ensure that multi-year, fundamental platform transformations are funded and delivered.

GX focuses on modernising technology, digitising processes, and improving the client experience. Our focus on technological agility demonstrates our determination to remain at the forefront.

The rapid integration of modern technologies significantly increases our agility to respond to shorter technology cycles and evolving client and regulatory requirements.

Finally, our investment in talent development ensures that we have a skilled, adaptable workforce with the

expertise to meet challenges and seize opportunities. We are very active in our work on career paths to ensure that our technical staff have clear and attractive career paths.

How do you hope your firm will benefit from this award?

This award recognises our commitment to excellence and innovation, reinforcing not only our reputation in the industry, but also the value of our ongoing initiatives.

It is an external endorsement of our leading platform, which strengthens client confidence, attracts new partnerships and clients looking for an innovative, forward-thinking financial institution. It motivates our team by recognising their efforts and dedication.

Receiving this award allows us to highlight our achievements and contribute to Lombard Odier's continued growth in the financial landscape.

Where do you see the wealth management industry and your part of it going in the next five years?

Over the next five years, the wealth management industry, including our role in it, will continue to evolve.

Technological advances will continue to shape the landscape, driving increased digitisation and automation in client interactions, portfolio management, and overall service delivery.

We also expect to see more regulation and guidance from various regulators, which will further increase the cost of doing business for all private banks.

Lombard Odier aims to lead the way in these changes, leveraging technology to meet the evolving needs of our clients in this dynamic landscape.



Geoffroy De Ridder
Head of Technology
& Operations
Lombard Odier



Winner

- **Domestic Private Bank**
- **Private Bank Operations Team**
- **Technology Outsourcing Solution**
- **Client Reporting**

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Consistency Of Core Principles Is The Key To Excellent Service

What was the winning formula on your firm that explains why you won?

To achieve robust, long term investment results across investment profiles for our clients, it is paramount to apply a disciplined and clear mindset with a patient, long term approach. We have a singular and passionate focus for due diligence and as our clients know, we are brand unaware with total attention on exceptional, single-minded investment managers.

Please describe how your colleagues made a difference.

Our team has a singular investment passion. We are hungry to read and learn more about the great investors of today and the past. We have no shortage of titles for our book club and our inclusive debate and challenge culture means that every opinion is valued.

We are fully aware that to excel in our industry, we must continue learning, evolving, and asking the right questions to keep on growing. We also recognise that making many small, steady, and incremental improvements over time, is a much less volatile path to further enhancements.

What are you going to do to remain competitive and stay ahead?

We have many projects on the go, some more gradual such as revisiting the fee terms we have with our providers or implementing even more extensive and comprehensive family office reporting.

A major exciting and long-term project is our goal to identify new boutique emerging managers who may become the flagship managers of the future. It is tremendously challenging to identify the future winners and we have allocated considerable resources, skills and focus to give ourselves an edge.

What sort of challenges did you surmount to reach this level, and how have you been able to succeed in such fast-moving circumstances?

Our core principles of Investment Consultancy and investing have remained very consistent over time. Extensive due diligence on current and future Asset Managers is key to outperformance whilst remaining calm and clear-minded during volatile periods, ensures measured decisions are taken. Most importantly, it is vital to have a team who are highly skilled, driven, and open to debate with a challenge culture to provide a balanced and thoughtful approach. We endeavour to recognise our individual behavioural biases by combining teams to ensure that decisions reflect every nuance.

What inspires you either inside or outside your organisation?

The essence of investment consultancy is that we have full freedom and total independence to guide each client to create the best blend of investment managers to meet their profile. The empowerment that comes with impartiality and sharing the same goals as your clients is immensely satisfying.

Our shared goal to achieve consistent, robust, and long-term returns with talented investment managers and fair fees, drives us every day. The privilege of investing with some of the most talented investment managers in the industry makes every day exciting and our learning curve never stops. We eat our own cooking and many of us in the team invest with the same businesses.

How do you hope your firm will benefit from getting this award?

As a judge on many investment panels, I know the hard work and energy that is applied to reviewing entries. We are immensely grateful to the judges of *WealthBriefing* for their expertise and diligence and we humbly treasure this award with great pride.



James Day
Managing Director
Peritus Investment Consultancy



Winner

• **Investment Consultancy**





WINNER: LGT Private Banking



WINNER: LGT Private Banking



WINNER: Lombard International Assurance



WINNER: Lombard Odier



WINNER: Lombard Odier



WINNER: Peritus Investment Consultancy

Piguet
Galland &
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Your private bank,
**Creator of
Serenity.**

Investing

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Innovating Wealth Management: A Journey Towards Client Serenity



Olivier Calloud
CEO
Piguet Galland



Winner

- **HNW Team (Swiss Domestic Clients)**
- **Wealth Management Rising Star Under 40**

Please explain what you think makes your firm successful in its chosen field?

We are a boutique private bank geared towards the Swiss market and backed by a majority shareholder of outstanding quality, Banque Cantonale Vaudoise. Our aim is to bring our clients greater peace of mind, and serenity, by concentrating on the worries which keep them awake at night and by helping them to achieve their life goals.

To do this, we offer services in three key areas: investments, financing (especially mortgage loans) and wealth advisory. This combination of expertise is quite unique for a private bank and enables us to fully support our clients in all their projects. We also seek to be an agile, approachable financial partner and to build close relationships with our clients. We believe that, ultimately, it is these close ties which make the difference.

How do awards such as this make a difference to your firm and your colleagues?

Over the past ten years, we've worked hard to position our bank at the heart of the local market – and in our clients' hearts too. Year after year, we've enhanced our service offering, our teams, our branch network and our business processes. We know that we're on the right track – the figures speak for themselves, and our business is growing.

But it's not just about the numbers, and this award is a wonderful recognition of all the hard work our teams have put in and the progress we have made. Our colleagues recognise this too, as do our clients and peers. This encourages us to continue and maybe even accelerate this dynamic!

When does success like you - can this be measured in hard numbers, or in qualitative ways, or both?

Success is measured primarily in quantitative terms – the number of accounts opened, net new money, net new

business volumes and revenue growth, for instance. We have indeed recorded very solid growth in all of these key indicators over the last three years.

However it's important to look beyond these figures and focus on other aspects that tell us more about the quality of the growth that we've achieved. Here, we consider such things as client and employee satisfaction, the strength and attractiveness of our brand, and our corporate culture.

What position would you like your firm to hold in its sector in five years' time?

We aim to bring our clients even greater serenity by focusing on excellence and proximity. We want to continue to grow, essentially in French-speaking Switzerland, and to increase our market share in a highly competitive, yet very dynamic, environment.

We also have major ambitions when it comes to our digital banking channels. Here, our goal is to reach and better serve new generations of clients, who are using digital channels more and more for their banking needs.

Alongside our digital banking projects, we've embarked on a major corporate social responsibility initiative. As part of this process, we've fine-tuned our governance structure, and we're working to improve our corporate culture, as well as our employees' autonomy and employability. We strive to ensure that our business practices are fair: we aim to reduce our impact on the environment, to continue to support our local communities, and assure the sustainability and transparency of our products and services.

To sum it up, we want to become recognised not simply as a key player in Swiss wealth advisory services for all generations of our clients, but also as a business role model aware of our responsibility in mastering the societal and environmental stakes which we face today.

Wealth Solutions. Simply Beautiful.

We are the private and independent Swiss bank
with a single objective: helping our clients thrive.



www.pkb.ch

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Zurich

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1206 Genève - Switzerland
T: +41 22 346 91 55

Beautiful Wealth Solutions In A Complex And Fast-Changing World

Founded in 1958 and based in Lugano, PKB Private Bank SA (PKB) is an independent private banking boutique with offices in Zurich and Geneva. PKB offers wealth solutions to private clients, entrepreneurs, institutional clients and external asset managers.

The bank is part of PKB Group, which manages CHF 12bn of assets (of which PKB Private Bank CHF ~6.5bn) and employs more than 200 client-oriented specialists located in Switzerland, Italy and Latin America.

What was the winning formula of your firm that explains why you won?

Our values, as well as the strong entrepreneurial culture embedded in the bank's history, distinguish us from our competitors. Dedication, professionalism and attention to the customer are in the DNA of the management and the shareholder family.

Drawing on decades of experience in private banking, our clients rely on PKB throughout their entire lives, allowing us to build long-lasting relationships that create value and impact.

Where do you see the wealth management industry and your part of it going in the next five years?

The last few years have been characterised by a high degree of economic and geo-political instability with significant impacts on financial markets. Faced with global anxieties and tensions, clients are closely observing the economic situation, seeking answers from qualified professionals. In particular, according to our experience the complexities of the current environment result into an increasing need for asset protection, stability and efficiency.

This trend will likely persist in the forthcoming years: therefore, we believe that the ability to cope with such complexity will be the true added value for private banks.

Furthermore, the disruptive technologies in the age of AI, the environmental challenges and the new priorities of the Next Gen are reshaping our world: in order to remain competitive, we need to decipher the major changes that are taking place.

What are you going to do to remain competitive and stay ahead?

Operating within this fast-changing environment is not easy but is pushing us to give even more importance to our "tailor-made" approach, which for us consists of a distinguished strength in listening and anticipating our clients' needs.

We take time to understand in order to be able to deliver effective and flexible wealth solutions. We intend to keep reducing the complexity for our clients, conveying trust and confidence within a challenging geo-political and economic framework.

How do you hope your firm will benefit from getting this award?

We are proud to represent excellence in Lugano, the third largest financial center in Switzerland. This award is a further recognition of our efforts to develop ourselves while maintaining a strong local presence: being rooted in the territory is indeed one of PKB's core values.

Our rootedness is reflected not only in the decision to be headquartered in Lugano, but also in the numerous initiatives that PKB launched to support local business and innovation with the goal to fuel a virtuous circle in the local economy.



Luca Venturini
CEO
PKB Private Bank SA



Winner

• **Lugano-Based Private Bank**



Tools & Analytics for Advisory

*Empowering the front office through
personalization, compliance & automation*

BENEFITS



Improve **efficiency**
& lower **costs**



Guarantee
compliance



Exceed **client**
expectations



Consistent **service**
quality standards

A Tale of Digital Wealth Management Innovation



Carmine Cammarota
Country Head Switzerland
Prometeia



What was the winning formula of your firm/you that explains why you won?

Prometeia's tools & analytics support the digitalisation of the entire investment advisory process through personalisation, compliance, and automation. Our WealthTech expertise, built up in 50 years, gives us the confidence to take on a market-leading role in the industry. Putting our clients and their needs at the center of everything we do and driving the wealth management industry forward with cutting-edge solutions is what makes us proud and successful. Close and long-term relationships with our clients allow us to understand the market needs and how best to meet them.

More than 100 financial institutions take advantage of our modular, compliant with regulations, sophisticated tools & analytics, leveraging them to serve their clients better and more efficiently, supporting the management of more than CHF 2.5 trillion in assets. Transforming the way private and retail banks interact with their clients through sophisticated, personalised and value-adding omnichannel services at scale continues to propel our success, ensuring the future belongs to our clients.

Please describe how your colleagues made a difference?

Prometeia's entrepreneurial-minded people represent our greatest asset and the key to our success. Our skilled, smart, and client-focused wealth specialists ensure the trust of our clients and our innovative digital wealth management solutions continue to meet and exceed market standards. We are lucky to have such diverse and unique individuals that combine technical excellence with world-class creative talent. We believe in our people as they support the entire advisory process with innovative tools powered by leading-edge technology, including Generative AI. Providing value and personalisation to investors, while lowering the cost to serve through automation and compliance, is where Prometeia's employees truly make a difference.

What are you going to do to remain competitive and stay ahead?

Innovation is firmly ingrained into Prometeia's DNA, and this is supported by our substantial investments in research and development which underlines the company's commitment to lead the wealth management industry. Throughout the last year and into 2024, we've actively explored, tested, and introduced new tools powered by Generative AI, aiming to enhance advisor efficiency and streamline business operations.

The successful integration of AI solutions within our toolset has improved advisor efficiency by cutting down manual work, enhancing engagement, and fostering customer loyalty. Prometeia has been taking on ambitious and bold projects to unlock innovation to shake up wealth management and stay ahead of the pack.

How do you hope your firm will benefit from getting this award?

The recognition for the third year in a row by *WealthBriefing* highlights the quality of our service and reinforces our main goal of consistently offering the best service for our client's needs. Awards like these make a significant difference and provide a testament to our strategic growth plan, our purpose and vision, and push us to strive for excellence. It gives us confidence that we do the right things in the right way and demonstrates our hard work, motivating us to continue to deliver best-in-class services.

Receiving this award will hopefully continue to strengthen our position in Switzerland and increase the number of financial institutions that consider us when updating their front-office systems and market data and analytics.



Switzerland's financial centres, Zurich and Geneva, are at the heart of the global financial services industry. Our clients benefit from our Zurich and Geneva offices, as well as from the worldwide infrastructure of Rawlinson & Hunter's international network.

Trust Services Our legal and accounting expertise allows us to offer all of our services in an in-house, partner-led, bespoke and personal manner. We have extensive experience in advising on the establishment and administration of trusts, private trust companies and foundations, and provide flexibility on the choice of the governing law for our trusts. We provide a full range of fiduciary services at trust level and at the level of their underlying entities.

Accounting Services for both trusts and corporate entities are offered and undertaken exclusively in Switzerland. These include traditional bookkeeping services and more specialised accounting for trusts (including specific UK tax pool computations) and special purpose vehicles. In addition to the accounting for our client's structures in-house, we also provide accounting services to other trustees in Switzerland and abroad.

Partners : Andrew McCallum, William Houseley, Leon Keen

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Trusteeships And Accounting In A Complex World



Andrew McCallum
Senior Partner
Rawlinson & Hunter
(Switzerland) AG

Rawlinson & Hunter is an international grouping of professional firms and a leading provider of trustee, financial and taxation advice.

The firm has undergone regular expansion since its formation in London in 1933, and today has offices in 10 countries, but serve clients worldwide.

R&H Switzerland has two physical offices in Switzerland: Zurich and Geneva.

What was the winning formula of your firm / you that explains why you won?

"We believe that the international structure of Rawlinson & Hunter is unique, not just in the way that it operates but also because of the extensive scope of services provided and the access to experienced trusted advisers across the grouping."

Whilst our clients and their advisors tell us that we are one of the few trust and corporate service providers worldwide that can effectively and efficiently manage trust structures of significant value and complexity, we pride ourselves on offering a personalised service to each and every client, regardless of size.

Trusteeship, corporate services, and accounting services are amongst R&H Switzerland's core strengths. Regarding our accounting practice, in addition to completing in-house all of the accounting for trusts under our trusteeship, we also provide accounting services to other trustees who do not possess this capability in-house, which distinguishes us from our peers.

What are you going to do to remain competitive and stay ahead?

Firstly, we shall remain independent, with no private equity or external shareholders. We feel this independence prevents conflicts of interest which is essential when acting in a fiduciary capacity. It allows us to operate on a completely open architecture basis, and in consequence we do not promote the use of any specific jurisdiction, structure, banking or legal services relationship over any other. This, in turn, allows us to provide tailored long term solutions to each family that best fit their specific needs and objectives. In addition, each mandate is directly led by one of the Partners as we wish to ensure a consistently high level of service as well as continuity in our client relationships.

Secondly, we endeavour to be thought leaders to help shape the industry in Switzerland whether by sitting on various industry leading boards, participating in (and sometimes leading) government consultations or providing various training courses to our peers (e.g. on accounting for trusts). To achieve this, we keep ourselves abreast of latest developments in the wider industry and also rely on the well-established expertise of the international R&H network.

Who inspires you, either inside or outside of your organisation?

This is much too difficult a question to answer in a few lines! I've benefited from learning from many people over my life and career so far. To answer generally, I would say that the volunteers of the Red Cross Red Crescent Movement provide continual inspiration, as they regularly operate under difficult and dangerous circumstances to benefit others.





SUCCESS. TOGETHER.

Crafting Wealth With Precision: REYL Overseas' Client-Centric Approach and Resilient Team Dynamics

Established in October 2011, REYL Overseas Ltd is a company established under Swiss law, licensed by FINMA (Swiss Financial Market Supervisory Authority) as a portfolio manager and registered with the SEC } (U.S. Securities and Exchange Commission) as an Investment Adviser. With offices in Zurich, REYL Overseas offers a comprehensive range of services to satisfy the needs of U.S. investors and recommends international diversification as a means to enhance portfolio return, whilst consistently managing risk.

REYL Overseas Ltd is a subsidiary of the REYL Intesa Sanpaolo Group, who manages combined assets in excess of CHF 20 billion (CHF 33 billion including minority interests) and employs around 400 professionals.

What was the winning formula of your firm/you that explains why you won?

The success of our firm can be attributed to our relentless commitment to a client-centric approach, the implementation of cutting-edge financial solutions and a profound understanding of the distinctive requirements of high-net-worth US-person investors.

Belonging to the Intesa Sanpaolo Group, the 4th largest European Banking group, allows us benefit from the group's resources to offer competitive solutions for a holistic wealth planning approach.

Please describe how your colleagues made a difference?

The team at REYL Overseas have truly distinguished themselves through their unwavering dedication, meticulous attention to detail, extensive knowledge of relevant financial markets and a commendable flexibility in navigating challenging financial landscapes.

ROVS is small enough to care and big enough to deliver.

What are you going to do to remain competitive and stay ahead?

We will continue to prioritise innovation, embrace new technologies, foster professional development among our team members, and maintain a proactive approach to anticipate and adapt to industry changes. With the support of our group, we focus on expanding our business in the near future.

What sort of challenges did you surmount to reach this level and how have you been able to succeed in such fast-moving circumstances?

In reaching our level of success, we overcame challenges by exercising strategic agility, adapting swiftly to regulatory changes, and maintaining a client-focused mindset amidst market uncertainties.

These skills have been a testament to our resilience and adaptability. Operating in a highly regulated environment we experience constant challenges from regulators and compliance guidelines.

Where do you see the wealth management industry and your part of it going in the next five years?

The entire industry is undergoing challenging times. Regulatory requirements, new technologies like AI and new asset classes like cryptocurrencies require the willingness of organisations and their staff to adapt constantly and keep a high learning pace. To remain a trusted advisor to our clients we need to keep ahead of the curve.



Roger Groebli
CEO
REYL Overseas



Winner

• **International Solution**

Approach life's adventures with peace of mind

Keep your pension on track as you transition to new life chapters. Whether you are between jobs, going on a sabbatical or becoming self-employed, our wealth expertise is here to guide you.

Our vested benefits solutions protect you against coverage gaps and let you choose your investment strategy.



Credibility Is Key To Serve Clients



Ivona Linder
Head of Corporate Affairs
Laurent Gagnebin
CEO
Rothschild & Co
Wealth Management
Switzerland

What was the winning formula of your firm/you that explains why you won?

Ivona Linder: I think credibility is key to our success. Our campaign covering the theme of pensions was from the beginning set up with a multichannel approach. Besides various other marketing tools we launched a targeted LinkedIn campaign and we also partnered with the University of Lucerne and their annual "VorsorgeDialog" study. This allowed us to organise an in-house event for clients and prospects as well as participating at the expert panel of the conference. All this enhanced our credibility in the field.

Laurent Gagnebin: Yes, the same applies to our integrated Private Markets Platform. The credibility of our offering is based on an outstanding global network with access to top tier private market managers and the alignment of interest. The latter meaning that we invest alongside our clients. It is therefore in the natural interest of our shareholders, that the investments perform well.

How do you hope your firm will benefit from getting this award?

Ivona Linder: Our aim is to consistently offer the best service for our client's needs and winning these awards will encourage us to work even harder to do so. Receiving such renowned awards recognises the team's hard work and demonstrates that we are always striving to deliver best-in-class service, something which we hope is compelling for new and existing clients alike.

What sort of challenges did you surmount to reach this level and how have you been able to succeed in such fast-moving circumstances?

Laurent Gagnebin: We as a bank are very close to our clients with approximately 30 clients per client adviser. We therefore know exactly what the needs are and where we need to have the best people to serve our clients. Thanks to our size and flexibility,

we are in a unique position to develop new offerings and launch them in the market. In addition, one of the big advantages is that due to our strong brand and good reputation we attract the best talents.

Where do you see the wealth management industry and your part of it going in the next five years?

Ivona Linder: There are more and more services in banking that are pure commodities, i.e. that are automated or digitally available. At the same time, the client adviser is gaining in importance again, because wealthy clients appreciate a partner at eye level who understands them and whom they trust. This is particularly the case in the field of pension planning.

Laurent Gagnebin: An additional important factor is access to new networks and ecosystems as well as experts in various industries. These are all factors that are very important in the private markets investment universe but do generally apply to a world where clients expect much more than just investment advice. In addition to specialist knowledge, the client adviser must have a lot of empathy and entrepreneurial thinking.



Winner

- **Private Market Investment Specialist**
- **Marketing Campaign or Team**

Shifting gears towards your future

We do not rest on our laurels. As an innovative Swiss law firm, we keep moving forward to provide you with excellence



**Schellenberg
Wittmer**
Attorneys at Law

www.swlegal.com

Unveiling The Winning Formula: Schellenberg Wittmer's Private Wealth Team At The Forefront In The Private Wealth Industry



What was the winning formula of your firm/you that explains why you won?

Our Private Wealth Group truly covers the full spectrum of contentious and non-contentious private client issues.

"We are highly skilled in advising individuals and families in their asset structuring and protection, regularly representing prominent families in complex matters."



**Andrea Dorjee-Good and
David Wallace Wilson**
Partners
Schellenberg Wittmer Ltd

Thus, our first-of-their-kind appeals against automatic exchange of information, on behalf of Latin American and Middle Eastern families, before the Swiss Supreme Court were recently reported in the media. Ditto for our current role in several multi-billion succession disputes.

Please describe how your colleagues made a difference?

As part of a fully integrated firm, the 20 members in our Group (composed of 7 partners, 11 associates and 2 of counsels) strive to teamwork, which is crucial for providing our clients with efficient, precise, timely and tailor-made solutions.

Being one of the leading full-service firms in Switzerland, we further work in close collaboration with our firm's tax, banking, corporate and real estate specialists. For example, we have lately worked with our arbitration colleagues to advise trustees and family offices on investment protection structures and on sanctions regulations.

What are you going to do to remain competitive and stay ahead?

We closely monitor the legal, political and social developments in Switzerland and abroad to keep abreast of the times. In particular, several team members regularly give lectures and write articles, which compels us to remain on top of technical developments; it's also a way of sharing our knowledge and giving back to society. For instance, despite the frantic days before Christmas, we issued a newsflash devoted to the revision of international succession law, on the very day the Swiss Parliament approved it, and in 3 languages (English, French and German, like all our newsletters are)!

Some of our members also give a lot of their time to professional associations (we have 2 former chairs of STEP branches and 1 current advisory board member of the SATC – Swiss Association of Trust Companies. This enables us to maintain a regular exchange with the academic world (our 2 of counsels are renowned university professors) and governmental bodies, as we also actively engage in shaping future regulations in Switzerland – e.g. we were part of the working group drafting the Swiss licensing regulations for trustees and asset managers.

Where do you see the wealth management industry and your part of it going in the next five years?

We believe that following (and, to some extent, even shaping) Swiss developments is paramount as one of our clients' biggest challenges has been and will be coping with the increasing pace of changes in the wealth management industry, both on a national and international level.



Winner

• Legal Team

PASS THE FUTURE ON TO THEM

The world you are building is unique.
With your banker, grow your assets
and make your vision come to life.



**THE FUTURE
IS YOU**



SOCIETE GENERALE
Private Banking

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360-Degree Expertise For The Benefit Of Our Clients



Franck Bonin
CEO

Societe Generale Private Banking Switzerland



Winner

- **Specialist International Team**
- **Investment Management Platform**
- **Credit Provider**
- **Corporate Strategy Implementation**

What was the winning formula of your firm that explains why you won?

The first thing that comes to mind is the unwavering commitment of the Bank's teams to providing the best possible service to our clients. 2023 was a challenging year for the financial industry, with volatile financial markets and rising interest rates, and Societe Generale Private Banking Switzerland was undoubtedly able to withstand these headwinds thanks to the exemplary dedication of its employees. I think the second factor that explains why our bank has been recognised in four categories is our constant drive for innovation and sustainability in our product and service offering. In the highly competitive Swiss environment, private banks must be able to offer efficient, innovative, and sustainable investment and financing solutions to a sought-after clientele, and that's exactly what we strive to do.

Ultimately, I would say that our winning formula is a combination of highly skilled and dedicated people, robust and effective solutions, and the backing of one of Europe's leading financial services groups. As it happens, the awards we have won illustrate this perfectly. The '*Specialist International Team*' award highlights the expertise, commitment and multicultural dimension of the bankers and account managers who support our international clientele. I see the '*Investment Management Platform*' award as a tribute to the excellence of our dealing desk, the cornerstone of which is our "Prime Market Access" platform and the experienced investment managers who keep it running every working day and public holiday, from the opening of European markets to the closing of US markets.

This is the second year in a row that we have won in the '*Credit Provider*' category, underlining the depth of our financing offering and the skills of our credit advisors. Finally, our joint initiative with Societe Generale's Corporate and Investment Bank for Family Offices, which is a wonderful example of the synergies within the Group that we leverage for the benefit of our clients, won us the '*Corporate Strategy Implementation*' award. And, of course, we couldn't have achieved these successes without the trust of our clients.

What are you going to do to remain competitive and stay ahead?

I believe the key to our success will be our ability to nurture both our centres of excellence and our differentiators. We will maintain our agile and opportunistic approach to asset management across asset classes and markets, which has enabled our DPM mandates to deliver strong financial performance in 2023, despite a challenging market and interest rate environment. We will further develop our financing offering, which is already much broader than what is traditionally available from banks, with innovations to be launched in the coming months. International wealth planning, drawing on the multi-jurisdictional expertise and offering of the different entities of the Group's Private Bank, will remain one of our key strengths to best serve our clientele. Supporting our clients who wish to invest in their passions through our art and wine banking solutions will remain of great importance. Finally, as a responsible private bank, we will continue to encourage our wealthy clients to consider sustainable finance and fully support them in their philanthropic projects to make a positive contribution to our world.



swissQuant



Empowering Financial Frontrunners

swissquant.com

Crafting The Future Of Fintech Engagement



From left to right: **Thomas McAdam**, Deputy Head of Marketing; **Patrizia Negri**, Lead Content Marketing; **Owen McCall**, Head of Marketing **swissQuant**



Discover swissQuant: Where Innovation Meets Tradition

Established in 2005, swissQuant is a technology firm specialising in the development and implementation of software solutions and data analytics tools for the financial industry. Today, we stand as a pivotal partner and growth catalyst among leading banks, wealth and asset managers, family offices, and clearinghouses, facilitating their digital transformation and geographic expansion.

Our mission is to bridge the gap between traditional financial wisdom and fintech innovation, fostering an environment where client relationships and advanced technology coexist and thrive. Working closely with our valued clients, we continuously explore and capitalise on new opportunities to bolster performance, augment team capabilities, and enhance client experiences.

Winning Social Media Strategies

We've taken a dynamic, people-focused approach to our social media strategy. By leveraging our in-house expertise and focusing on producing content with real value for our audience, we've created campaigns that not only engage, but also educate. From rich video content to personal branding workshops and in-house social media coaching, our team ensures a consistent and authentic brand voice, with a clear and conscious focus on promoting diversity and inclusion both internally and amongst our valued partners and clients. The results are evident: increased engagement, higher conversions, and a community that actively engages with our content.

Think Big, Work Lean

Despite being a compact team, our impact rivals that of much larger international teams. This achievement stems from a shared

vision of creativity and entrepreneurial spirit. By highlighting our internal talent and leveraging our network, we've set a benchmark for compelling, informative content. It's this unique blend of passion, innovation, and authentic storytelling that allows us to punch above our weight in the industry.

"Building a team culture centered around ownership, open feedback, and continuous learning is a key objective for us", says Owen McCall, Head of Marketing & Communications, "our team's diverse experience, dedication to quality and skill in leveraging innovative tools and strategies positions us to consistently deliver exceptional results".

Staying Ahead of the Curve

We've seen that the fusion of dynamic video production and strategic, multi-touch marketing delivers tangible results. Moving forward, we'll continue to explore new tools, platforms, and media avenues, looking to connect with and provide value to our audience in innovative and dynamic ways. Currently, we are integrating AI-driven data analytics into our strategies and experimenting with emerging technologies such as augmented reality to enhance client engagement. Through these initiatives, we aim to push the boundaries of traditional fintech services, setting new standards for innovation in the industry.

Winning the 'Best Use of Social Media' award is a testament to our effective marketing and communications strategies and the impact we've had in leveraging social media to connect with our audience. This recognition will further boost our brand credibility and visibility, enabling us to expand the reach of our content and messaging, ultimately solidifying both our position as an industry leader and our relationships with our valued audience, clients, and partners.

We explore, identify, and analyse patterns within financial markets, human behaviour, and technological innovation to

ANTICIPATE MARKET TRENDS

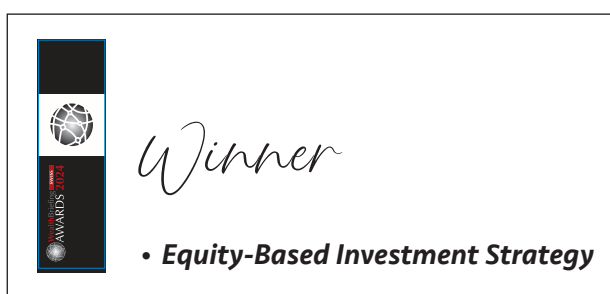


TARANIS

How Understanding Investors Can Drive Success



Julien Leegenhoek
CEO & Portfolio Manager
Taranis SA



Taranis is an innovative Swiss Asset Management company that offers various advanced investment solutions to clients founded on our unique approach to technology use.

Technology is at the heart of our DNA. We embed technology in all steps of our investment process, from data modeling, to trading implementation and risk management.

"If we had to guess what was the "winning formula" for the amazing recognition, we believe it would be the market approach of our main fund, Taranis Market Sentiment which is, by essence, different from our peers."

Academic research has shown that less than 20% of market movements on major stock indices are explained by fundamental factors such as earnings, dividends or macroeconomics.

Standard finance models, that focus on unemotional investors preferences, have failed to explain several empirical market anomalies. Behavioural finance has managed to bridge the gap. Human psychology, in particular emotional mindsets, play a key role when making investments decisions and understand investors' "animal spirits", introduced by Keynes in 1936.

Now, the question is how to measure investor sentiment and quantify its effects. We have built a sophisticated framework using a multitude of quantifiable behavioural indicators to model the overall mood of the market.

We believe that understanding investors behavioural language, their optimism or pessimism and ultimately their risk appetite, help us make predictions on their demand for risky assets. We combine behavioural psychology with rigorous statistical analysis to strengthen our model predictions.

High quality academic research is the foundation of our investment approach. Market sentiment is a relatively new field of economic and financial research, thus, offers tremendous prospect for finding new patterns between exogenous data and market returns.

Data is the most important and vital aspect of our strategy. We use rigorous statistical methods to select each variable of our models. We continuously reassess the validity of our variables and test new datasets to discover new correlations.

With a combination of academic research, data development and technology optimisation we believe we are well positioned to generate performance with our daily liquidity systematic strategy.

"This award is an unbelievable industry recognition for our firm and will undoubtedly bring attention to the groundbreaking academic fielding we are pioneering."

PREMIUM WEALTH MANAGEMENT & ESTATE PLANNING



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WE SIMPLIFY COMPLEXITY.

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We structure, protect and develop
our clients' assets like our own.
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performance.

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Winner For 3 Consecutive Years, For The Best Corporate Service Provider This Time



What was the winning formula of your firm/you that explains why you won?

TrustConsult (Suisse) SA is an independent Trust Company based in Geneva with world-class expertise trusted advisors providing top-notch services to entrepreneurs and wealthy individuals along with their families from global background. Our winning formula is driven by our philosophy to operate ethically and with integrity. Our clients are treated with respect, honesty and transparency. We managed to create close relationships and bring our full dedication to provide them with tailor-made services along with great confidentiality and real protection. We can therefore focus on offering listening and excellent problem-solving skills. Because in everything we do, we are inspired by our predominant goal to create value beyond wealth, we were able to draw on over years of practical experience in helping clients to discern and address the challenges of creating, and preserving wealth. All this has enabled us to grow a connexion of trust and proximity with our clients, and has proved to be beneficial for both sides, since most of our new customers and businesses were directly referred to us from our existing clients.

Please describe how your colleagues made a difference?

We are a Boutique Firm with a greatly dynamic, enthusiastic and motivated team. We have brilliant personalities, who are truly dedicated, hardworking and considerate. Every person brings a particular touch and genuinely cares about delivering excellent quality work to our clients. Our team's extensive collaboration



TrustConsult (Suisse) SA

and efforts have shown to make time and time again a great difference towards achieving our goals and success.

What are you going to do to remain competitive and stay ahead?

We are focused on remaining flexible, independent and in-house experts. In addition, perpetuating our independence will allow us to think bigger for our clients and develop our resources internally. TrustConsult's main goal is to be able to manage any in-house project, to provide the client with a complete and seamless solution through the same confidentiality and proximity that has made and continues to advance our reputation. We will therefore continue to provide services, that are competitive with those of large organisations, while keeping a boutique-spirit to preserve the connexion with the client.

How do you hope your firm will benefit from getting this award?

Receiving this award will definitely bring further recognition of our expertise and provide us with even greater visibility within our industry. It will also inspire us to continue to aim beyond excellence in our domain and remain ahead of our competitors.

Where do you see the wealth management industry and your part of it going in the next five years?

As we know growth is fueled by rapid geographical expansion, the development of adjacent lines of business, with vertical upwards and downwards integration, and the relentless pursuit of always more innovative new services. The wealth management industry will definitely continue to be growing and so will we. We hope to double our workforce within the next 5 years and continue to win some more awards along the way.

We are UMA

Unique Mindful Assured



WEALTH MANAGEMENT SERVICES

UMA Group (UMA) is a private client and family wealth consultancy group specializing in tailored wealth management services for individuals, families, and companies. As a boutique service provider, we combine our expertise with customized solutions to meet the unique needs of our clients.

LONDON - ZURICH - ZUG - LUXEMBOURG - LARNACA



www.umawealth.com



Your Vision – Our Mission: Tailoring Services To Meet The Client's Personalised Requirements



From left to right: **Fabio Mastrosimone**, Managing Director and Member of the Board (Luxembourg); **Geralda Kral**, Managing Partner and Group Partner (Zurich); **Alvaro Beccera**, Group CEO (London); **Elisa Paola Armandola**, Director and Member of the Board (Luxembourg) **UMA Wealth (Switzerland) AG**

What was the winning formula of your firm that explains why you won?

UMA Wealth Group won this category because of who we are as a team. We stand out as a **unique** group of professionals, each with diverse cultural backgrounds, varied professional expertise, and vast work experiences. Despite the varied backgrounds, we share one common goal: to provide bespoke services to our clients. We firmly believe this unity is essential for us to be able to execute the tasks our clients have entrusted to us and to support our clients in reaching their goals as a family and as business owners.

At the core of our approach lies a commitment to the belief that families and UHNWIs seek not only to be heard and understood but wish to be serviced in a way that meets their unique financial and personal objectives within the legal and compliant parameters and environment of the constant global changing regulations. Our philosophy centers on addressing clients' needs by providing services that align with their personal goals. We aim to be **mindful** of what is essential to our clients and the persons who support them and help them reach the objectives for which they have requested our support.

We are a dedicated team, confident and **assured** of our problem-solving expertise for SME companies and entrepreneurial families, particularly within the Latin American landscape. Our proven track record has garnered international recognition, solidifying our position as a trusted partner. Functioning as a valuable supplement to established family offices and legal teams, we seamlessly integrate into our client's operations, harmonising efforts to achieve common goals. Our skills, encompassing both technical and soft skills, are vital to achieving this collaboration with global families who wish to invest, live, or protect their assets

in highly regulated jurisdictions, such as the ones in which we operate.

What sort of challenges did you surmount to reach this level, and how have you been able to succeed in such fast-moving circumstances?

We founded UMA Wealth Group one year before the pandemic. This meant we immediately had to re-evaluate our growth strategy and adjust our work methodology and service approach to accommodate the "new" global situation. We needed to understand the priorities of our clients and team members during that time. It was equally challenging to readapt post-COVID.

How do you hope your firm will benefit from getting this award?

Our colleagues are honoured to be recognised for the time, hard work and passion they have invested in UMA Wealth and its clients. This acknowledgment is a testament to the fact that our philosophy and vision are being appreciated, and it is a clear indication that we are headed in the right direction. We are excited to see where the next few years will take us.

Where do you see the wealth management industry and your part of it going in the next five years?

As our industry progresses, it will become increasingly transparent and more regulated. As professionals, we need to continue to maintain high standards by keeping ourselves well-informed and updated with the current trends. We should surround ourselves with the right specialists and problem-solvers and plan carefully when it comes to helping our clients achieve their objectives.

THE DRIVE YOU DEMAND

CREATING A STRONG CONNECTION. BECAUSE RELATIONSHIPS MATTER.

We want to extend our warmest thanks to all our clients for their trust and support, which has enabled us to develop the high-quality services that have earned us recognition as “Best Family Office Offering” at the WealthBriefing Swiss Awards 2024.



WINNER
Family Office Offering

Wealth & Asset Management | Treasury & Trading | www.ubp.com

UBP is authorised and regulated in Switzerland by the Swiss Financial Market Supervisory Authority and is authorised in the United Kingdom by the Prudential Regulation Authority. UBP is subject to regulation by the Financial Conduct Authority and limited regulation by the Prudential Regulation Authority.

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UNION BANCAIRE PRIVÉE

UBP Have Created The Winning Formula



Monica Espinosa
Head of Family Office
Union Bancaire Privée, UBP SA



What was the winning formula of your firm/you that explains why you won?

In the realm of asset management, Union Bancaire Privée (UBP) ensure outstanding services by prioritising its core competency and strategically outsourcing non-core activities. By recognising its limitations and entrusting specialised tasks, such as family governance, to external experts, UBP maintains exceptional quality standards without overextending resources. This targeted strategy serves as UBP's winning formula, distinguishing it in the competitive financial services landscape. The firm's success is a testament to the effectiveness of focused expertise, allowing them to stand out and deliver outstanding services in their specialised domain.

Please describe how your colleagues made a difference

Our colleagues, both in the Family Office Services team and also within UBP as a whole, are fundamental to optimising our services. Our team members have a unique, long-term experience of the industry, covering the different drivers of wealth, asset and expertise governance. Their extensive knowledge and solid industry networks have not only enriched our team but have also consistently driven successful outcomes. This is combined within the wider UBP ecosystem where we can, for example, leverage dedicated wealth planning services and investment management insights.

What sort of challenges did you surmount to reach this level and how have you been able to succeed in such fast-moving circumstances?

Our primary strategy has involved actively listening to both our clients' concerns and the community stakeholders' solutions. We have also built upon our experience as well as the solutions developed with other clients. By leveraging our exceptional reach, which provides a wealth of client data, we have crafted unique, tailored solutions for each client. This attentive approach has been crucial for success amidst fast-moving circumstances and the continuous evolution of market and client demands.

What are you going to do to remain competitive and stay ahead?

At the core of our mission lies an unwavering commitment to

service quality and excellence. Our success trajectory hinges on the provision of tailored and innovative services, surpassing a mere product-driven approach. We prioritise engaging with clients through a thoughtful dialogue, posing the right questions, and sharing experiences to collaboratively define optimal solutions for their families. By continually nurturing our experience and expertise, we aim not only to stay ahead but also to share our evolving insights with our clients, ensuring a symbiotic growth that transcends conventional financial service paradigms.

Who inspires you, either inside or outside your organisation?

Our greatest inspiration comes from our clients. Their success, along with their clear objectives and relentless drive, constantly motivate us. Observing their achievements and determination pushes us to raise our standards and strive for excellence in our own pursuits. Additionally, the satisfaction they express when we overcome significant hurdles through innovative solutions and establishing an institutional governance framework characterised by harmony and unity is particularly motivating.

How do you hope your firm will benefit from getting this award?

Receiving this award will formalise the positive feedback UBP consistently receives from our clients. It will serve as tangible recognition of our efforts and success, thus enhancing our positioning in the industry. This accolade will reinforce our reputation and validate the high standards of service and excellence we strive to maintain.

Where do you see the wealth management industry and your part of it going in the next five years?

In the next five years, the wealth management industry, especially the single-family-office sector, is anticipated to experience significant growth and become more sophisticated. As an increasing number of families establish their own single-family offices, the industry must evolve and position itself to meet these new demands. Despite this expansion, single-family offices might still feel the need for knowledge-sharing. This need is reflected in the growing number of family-office events designed to foster connections and collaboration.



The **All-In-One**
Wealth & Asset Management
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ADMIN & BACK-OFFICE - COMPLIANCE - REPORTING

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www.wize.net

 **TEAMWORK**

Great Support That Makes A Business Stronger

What sets you apart from your peers this year and why?

WIZE by TeamWork, the all-in-one Wealth & Asset Management solution, is one of the fastest growing WealthTech companies in Switzerland dedicated to external asset managers, family offices, private banks, fund managers, pension funds and securities traders. Part of the TeamWork Group, a 1,000+ employees Swiss company founded in 1999 and fully owned by its top management, we offer a unique 100 per cent web-integrated SaaS secured Cloud or on-premises platform including:

- Portfolio management system with model portfolios and rebalancing/hedging capabilities; private equity module; risk and performance management (MWR/TWR, contribution/attribution);
- Order management system including FIX Straight Through Processing connectivity with 20+ trading rooms;
- CRM System with KYC and documents lifecycle management;
- Compliance System with AML; MiFID II and LSFIn/FIDLEG/FinSA pre-trade checking; risk profiling & monitoring; full audit trail;
- Reporting system with white labelled customised multi-assets consolidated reports;
- Invoicing system including automatic fees calculation and controlling; profitability measurement; and
- Multi-custodian connectivity: 200+ automatic feeds; API connectivity;
- e-banking / Mobile App.

In Geneva, Zurich, Singapore, Luxembourg and Montreal, our team of 45 professionals aims at delivering best in class support and back-office business process outsourcing (BPO) services thanks to our extensive banking operations expertise gained by most of us in different banks and/or family offices. Trusted by over 100 clients representing 125+ billion AuM and 3,000+ users in 22 different countries, we allow clients to focus on their business while taking advantage of the platform's power and scalability for an attractive all-in-one monthly fee.

Our focus: intuitive user experience, rich & performing functionalities, easy and

transparent pricing. We therefore think all these elements set us apart from our peers and make us an outstanding 12 years old fintech.

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

WIZE by TeamWork is first of all a fantastic success story based on people. WIZE is born out of the meeting in 2010 between Philippe Rey-Gorrez – the founder of the TeamWork Group - and Cédric Baiker, an expert in IT banking solutions who had driven the development of the swiss "Newbanking" core banking package from 1996 to 2010. Realising that the market solutions dedicated to private banking and external asset managers (EAM) were abnormally expensive, not sufficiently functional, and mainly based on legacy technologies, it was clear that in a context of increasing regulation and financial transparency, there would be a growing need for the EAM community to rely on more sophisticated, functional and secure solutions that would enable them to respond efficiently to their business challenges and constraints. Cedric had spotted a gap and a really growing need for EAMs and Philippe decided to invest in this team of 4 since he believed in them. The development therefore started in 2010 from a white sheet with the latest available technologies and with absolutely no legacy. After two years and a huge investment in R&D, the first customer was signed in 2012. Since then, the WIZE by TeamWork team continuously grew to a team of 45 today and continued to be ahead of market trends, evolving constantly.

What do you hope will be the result of receiving this accolade? How does it help your business in this region?

We hope this accolade will be perceived by our clients and team members as a strong evidence that our collaboration during the last 12 years has produced a remarkable and scalable platform. We therefore see this accolade both as a recognition of the high quality work delivered but also as a good evidence for our prospects that they can feel in good hands with our WIZE by TeamWork platform and team.



Pierre Dupont
Managing Partner
WIZE by TeamWork



Winner

- Risk Management Solution
- Leading Individual





WINNER: Piguet Galland



WINNER: Selman Bicaco Urrutia - Piguet Galland



WINNER: PKB Private Bank SA



WINNER: Prometeia



WINNER: Rawlinson & Hunter (Switzerland) AG



WINNER: REYL Overseas



FOR PROFESSIONAL INVESTORS ONLY

FINDING LONG AND SHORT OPPORTUNITIES IN EUROPE

The Liontrust GF European Strategic Equity Fund, which launched in 2014, is managed by James Inglis-Jones and Samantha Gleave. The Fund aims to achieve a positive return over the long term by applying the Cashflow Solution Investment Process.

The Fund takes a variable long/short approach to allow the managers to alter the size of the portfolio's long and short exposures to reflect their assessment of the investment environment. This approach creates the potential for attractive returns in all market environments.

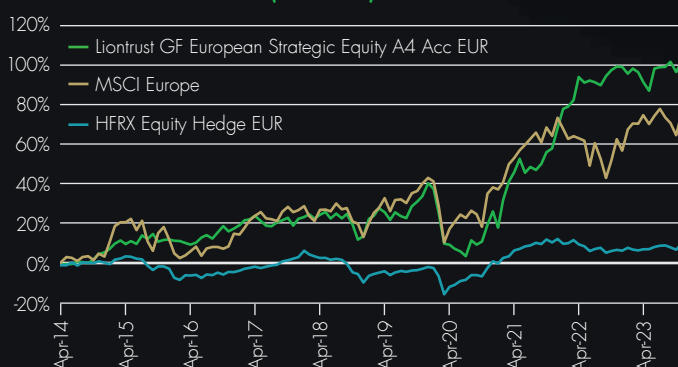
How is the GF European Strategic Equity Fund differentiated

- The managers believe cash flow is the single most important determinant of shareholder returns and is the most reliable guide to future profitability and stock price valuation
- The process invests in companies with strong cash flows that are attractively valued on cash flow and run by company managers committed to an intelligent use of cash flow
- The process aims to short sale expensive companies that are run by management who combine over-confidence in their forecasting ability with a willingness to back their forecasts with substantial growth in operating assets such as property, equipment or stock
- The investments are based on detailed analysis of report and accounts. Companies are first identified through a cash flow screen
- The focus on cash flow incorporates value, growth and quality investing, leading to a highly complementary portfolio that has outperformed in both value-led and growth-led markets
- The Fund is typically lowly correlated with other asset classes and funds
- The Fund has a proven track record of positive returns through both stock selection and management of market exposure

Source: FE Analytics, as at 31.12.23. Liontrust GF European Strategic Equity Fund, A4 share class, net of fees, income reinvested, Euros versus MSCI Europe and HFRX Equity Hedge EUR comparator benchmarks. Liontrust GF European Strategic Equity Fund was launched on 25.04.14

Past performance does not predict future returns

Performance since launch (25.04.14)



Cumulative returns %	3 years	5 years	Since launch
Liontrust GF European Strategic Equity	59.3	76.8	102.4
MSCI Europe	31.2	59.9	82.4
HFRX Equity Hedge EUR	10.1	23.0	12.2

You may get back less than you originally invested

For more information, please contact Valentine Bugeja:

✉ valentine.bugeja@liontrust.eu ☎ +41 79 109 4900

To find the latest views of our fund managers, go to:

liontrust.eu

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The Tenth Annual WealthBriefing Swiss Awards Winners 2024

WEALTH MANAGEMENT TECHNOLOGY CATEGORIES (VENDORS)

**Transaction
Processing Solution**

WINNER

A Z Q O R E

**Portfolio
Management Solution**

WINNER

etops

**Client
Communications Solution**

WINNER

finfox

**Compliance
Solution**

WINNER

eRI

CRM System

WINNER

**WEALTH
DYNAMIX**

Data Provider

WINNER

wecan

**Risk Profiling
Solution**

WINNER

prometeia

**Risk Management
Solution**

WINNER

**WIZE
BY TW**

Onboarding Solution

WINNER

ss&c

**Most Innovative
Client Solution**

WINNER

CBH | Compagnie
Bancaire
Helvétique

**Technology
Outsourcing Solution**

WINNER

17  96
LOMBARD ODIER
LOMBARD ODIER DARIER HENTSCH

**Implementation of
a Technology Solution**

WINNER

aixigo
Driving the New Wealth Experience.

AN OPEN WINDOW ON OPPORTUNITIES

There is more to executing an investment transaction.
At MCB, we see it as an opportunity to create meaningful
partnerships with investment professionals and their clients.

Born in Mauritius, a vibrant and multicultural blend of three continents,
the Mauritius Commercial Bank (MCB) is a solid financial group with a
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Connect with us at eam@mcb.mu



WEALTH MANAGEMENT TECHNOLOGY
CATEGORIES (VENDORS) CONTINUED...*Client Accounting
System*

WINNER

FundCount*Front Office Solution*

WINNER

MARKETING/PR
CATEGORIES*Use of Social Media*

WINNER

swissQuant

Mastering Complexity

*Marketing Campaign
or Team*

WINNER

Rothschild & Co
Wealth Management

SPECIALIST WEALTH MANAGEMENT CATEGORIES

*Most Promising
New Entrant*

WINNER

**Kiavila
Avocats***Wealth Management
Executive Search Firm*

WINNER

DART*Wealth Planning
Team*

WINNER

**LOMBARD
INTERNATIONAL
ASSURANCE***30+ years of making legacy count**Corporate Services*

WINNER

TRUSTCONSULT SUISSE
TRUST IN MOTION*International
Solution*

WINNER

REYL
OVERSEAS*Corporate Social
Responsibility/Diversity
Programme*

WINNER

INDOSUEZ
WEALTH MANAGEMENT*Insurance Offering*

WINNER

INDOSUEZ
WEALTH MANAGEMENT*Impact Investing*

WINNER

INDOSUEZ
WEALTH MANAGEMENT*ESG*

WINNER

**Private
Banking**



YOUR STORY IS OURS TO TELL

Pulsar Media acts as your trusted advisor in times of growth, or in times of hardship. We provide expert media relations services and clever storytelling, offering counsel, strategy and content to grow and protect your business.

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PRIVATE CLIENT CATEGORIES

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Boutique Firm

WINNER


Estate Planning
Advice

WINNER


Tax/Accountancy
Team

WINNER


Independent Trust
or Fiduciary Company

WINNER


Management
Consultancy

WINNER



INVESTMENT MANAGEMENT CATEGORIES

Fund Manager

WINNER


Alternative Fund
Manager

WINNER


Private Investment
Office/Multi-Family Office

WINNER


Fixed-Income
Investment Strategy

WINNER


Equity-Based
Investment Strategy

WINNER


Digital Assets
Solution

WINNER



FX Solution Provider

WINNER


Private Market
Investment Specialist

WINNER


Investment
Consultancy

WINNER





Perpetual Global Adverse Media Monitoring

Private banks and wealth managers need 24/7 risk vigilance.

But with millions of news items from thousands of sources and in multiple languages generated daily, how can they be sure to receive need-to-know alerts rather than irrelevant noise?

smartKYC's latest product, smartEYE, solves all of these problems.

- ✓ Watches the world's news and social media commentary in real-time, 24/7 to deliver precise risk alerts as soon as they are reported.
- ✓ Carries out automated news analysis ensuring alerts are risk-classified according to your risk framework, are specific to your client, and contain new (rather than repeat) information.
- ✓ Is truly multilingual so you can be as confident of your adverse media monitoring in languages such as Russian, Arabic or Chinese, as you are in English.

With smartEYE, private banks and wealth managers get risk-relevant, real-time alerts about their customers that allows them to act decisively and quickly. Compliance teams no longer have to wait for a periodic refresh cycle. Instead, they receive adverse media trigger events in the form of precise alerts, as that news breaks. smartEYE represents the ultimate solution for perpetual KYC risk monitoring. smartKYC proudly sponsors this awards ceremony and we congratulate all the winners!

Discover smartEYE
www.smartkyc.com/smarteye/



Proud sponsors of this award ceremony

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**Lugano-Based
Private Bank****WINNER****Family Office
Offering****WINNER**

UNION BANCAIRE PRIVÉE

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International Team****WINNER****Investment
Management Platform****WINNER****Corporate Strategy
Implementation****WINNER****Customer Facing
Digital Capabilities****WINNER****HNW Team (Swiss
Domestic Clients)****WINNER****UHNW Team (Swiss
Domestic Clients)****WINNER****Private Bank in
Liechtenstein****WINNER****UHNW Team
(International Clients)****WINNER****Private Bank
Operations Team****WINNER****Domestic Private
Bank****WINNER**



WINNER: Rothschild & Co Wealth Management



WINNER: Rothschild & Co Wealth Management



WINNER: Schellenberg Wittmer Ltd



WINNER: Societe Generale Private Banking Switzerland



WINNER: SS&C Technologies



WINNER: swissQuant



WINNER: Taranis SA

PRIVATE BANKING
CATEGORIES
(CONTINUED...)*Private Bank
Leadership Team*

WINNER

EXTERNAL ASSET
MANAGER (EAM)
CUSTODIAN CATEGORIES*Overall Platform for
External Asset Managers*

WINNER

WEALTH MANAGEMENT
TECHNOLOGY CATEGORIES
(IN-HOUSE SOLUTIONS)*Client Reporting*

WINNER


LOMBARD ODIER
LOMBARD ODIER DARIER HENTSCH

LEADERSHIP CATEGORIES

*Wealth Management Rising Star
Under 40*

WINNER

SELMAN BICACO URRUTIA

 Piguet
 Galland &
 vous.
*Women in Wealth Management
(Individual Contribution)*

WINNER

NADIA BARGETZI

*Outstanding Contribution to Wealth
Management Thought Leadership (Individual)*

WINNER

CHARLES-HENRY MONCHAU

*Leading Individual*

WINNER

PIERRE DUPONT

*Lifetime Achievement*

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GLOBAL AWARDS

Showcasing The Best in the Industry

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

2024 Announcements Schedule

18 JANUARY 2024

Miami Family Wealth Report Awards
incorporating Latin America & the Caribbean

8 & 22 FEBRUARY 2024

WealthBriefing Swiss Awards
WealthBriefing WealthTech Americas Awards

6 & 21 MARCH 2024

WealthBriefing Swiss EAM Awards
WealthBriefing European Awards

2 & 30 MAY 2024

Family Wealth Report Awards
WealthBriefing Asia & Greater China Awards

27 JUNE 2024

WealthBriefing Wealth For Good Awards

3 OCTOBER 2024

WealthBriefing Asia EAM Awards

21 NOVEMBER 2024

WealthBriefing MENA Awards

5 DECEMBER 2024

WealthBriefing Channel Islands Awards



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