




# ACCLAIM

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

The Tenth Annual  
*WealthBriefing*  
Swiss Awards  
Winners 2023



February 2023



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## Foreword

**TOM BURROUGHES**  
Group Editor, *WealthBriefing*

The latest annual Swiss Awards are held to recognise achievements of top-notch practitioners in the Alpine state. With the world remaining a volatile place and economic and financial markets in ferment, the need for clear and calm advice has never been more important.

Home to many of the world's most renowned banks and technology firms, Switzerland has been guarding and investing clients' money successfully for centuries. Maintaining standards requires constant effort - these awards salute the work that gets done.

The organisers of this news service's awards programme know how much those who take part value them. They are valuable for firms and people as marketing tools and ways to construct brands. *WealthBriefing* takes great pride in how this programme also gives the editorial and commercial teams a chance to build on existing relationships and forge new connections.

As editor, I am delighted that we have been able to track the work done in the Swiss wealth management sector, and I look forward to doing so in future.

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### Overview Of The Swiss Wealth Management Sector

Switzerland is the world's single-largest offshore centre, even though rival hubs are trying to win a piece of the pie. A report by Boston Consulting Group last year predicted that Hong Kong will overtake the Alpine state in 2023 – although the pandemic-driven restrictions in the Asian centre might mean that won't yet come to pass.

According to Deloitte in 2021, Switzerland is home to \$2.6 trillion of offshore assets, Switzerland is the largest booking centre. (The country also was also top in Deloitte's competitiveness rankings in that report.)

More than a decade has flown by from when Switzerland inked a sweeping set of agreements with the US to regularise

bank accounts which, combined with other moves, spelled the effective end internationally of bank secrecy.

Switzerland's financial sector, rather like its luxury wristwatch sector in the 70s, has reinvented itself – the country is a hub for digital assets, fintech firms and innovative asset managers. It also continues to exploit its standing for political neutrality and stability, a high quality of life and educational rigour. In compliance terms it's not a soft touch: in 2022 Switzerland endorsed EU sanctions against Russia – an unprecedented move.

Some of its banks have been through tough times, such as Credit Suisse, but this is a country with a record of bouncing back from adversity.

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# The Judging Panel

The *WealthBriefing* Swiss Awards 2023 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.



**BEAT BACHMANN**  
CEO Switzerland &  
Emerging Markets  
**BNP Paribas (Suisse)**



**MARC BERGER**  
Associate Partner  
**EY**



**PHILIPPE BONGRAND**  
CEO  
**FNZ**



**FRANCK BONIN**  
Chief Executive Officer  
**Societe Generale**  
Private Banking



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



**JAMES DAY**  
Managing Director  
**Peritus Investment**  
Consultancy



**PIERRE DUPONT**  
Managing Partner  
**WIZE by TeamWork**



**STEVE DYSON**  
Director  
**Investment & Wealth**  
Management  
Consultants



**LAURENT GAGNEBIN**  
CEO  
**Rothschild & Co**



**MARIANA GREGORI**  
Managing Director  
**UBS Wealth**  
Management



**XAVIER ISAAC**  
CEO  
**Accuro**



**LAURENCE MANDRILE AGUIRRE**  
Managing Director  
**Citi Private Bank**



**DANIEL MARTINEAU**  
Executive Chairman  
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**ANDREW MCCALLUM**  
Senior Partner  
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**MARK MILES**  
Partner, European Head  
of Wealth Management  
**McLagan and Scorpio**  
Partnership,  
(Aon companies)



**JEAN-CHRISTOPHE PERNOLLET**  
CRO  
**Edmond de Rothschild**  
Group



**OSMOND PLUMMER**  
Managing Director  
**Wealthcoaching.ch**



**JÜRGEN PULM**  
Head of Private Banking  
for CPB Services  
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# 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.



**MATHIEU SAINT-CYR**  
*Managing Director &  
 Head of Asset  
 Management*  
**Geneva Management  
 Group**



**RAY SOUDAH**  
*Chairman and  
 Founding Partner*  
**MilleniumAssociates**



**MATTHEW SPENCER**  
*Head of Business  
 Development and  
 Marketing*  
**Close Brothers Asset  
 Management**



**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**  
*Advisor*  
**Various**



**WILLIAM TROUT**  
*Director of Wealth  
 Management*  
**Javelin Strategy  
 & Research**



**BRUCE WEATHERILL**  
*Chief Executive*  
**Weatherill Consulting**



**DAVID WILSON**  
*Partner*  
**Schellenberg Wittmer**





**WINNER: Accuro**



**WINNER: Pierre Gabris - Alpen Partners AG**



**WINNER: aixigo**



**WINNER: Pierre Gabris - Alpen Partners AG**



**WINNER: AW+SWITZERLAND**



**WINNER: Bank Syz**



**WINNER: Barclays Private Bank**







**WINNER: BearingPoint**



**WINNER: Bedrock Group**



**WINNER: Banque Internationale a Luxembourg (Suisse) SA**



**WINNER: BNP Paribas Wealth Management**



**WINNER: CheckSig**



**WINNER: Citi Private Bank**



**WINNER: Dorsum Ltd**



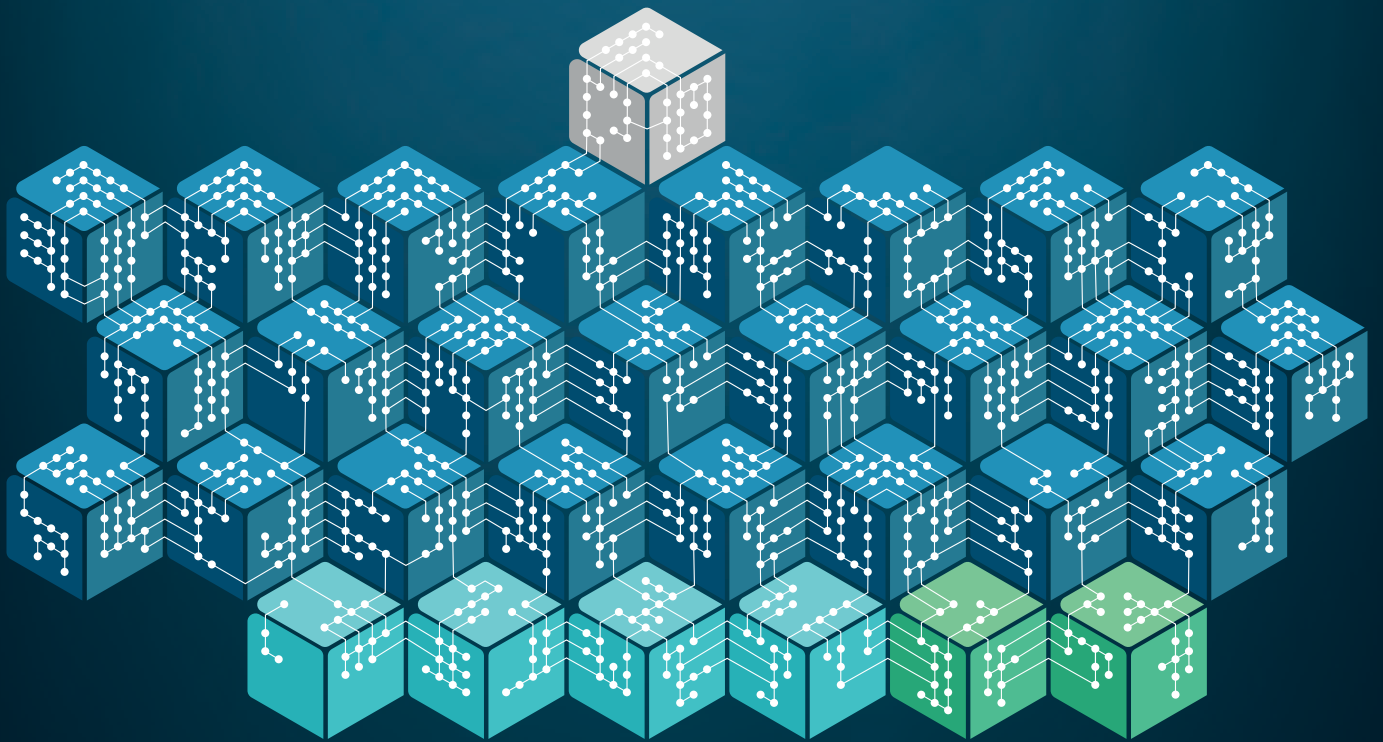
**WINNER: Convero AG**



**WINNER: Dorsum Ltd**



aixigo's **API-based aixigo:BLOXX Wealth Management Platform** is the **world's fastest platform** for creating individual, innovative and profitable wealth management services.



### Our Customers



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# Cutting Through Complexity For Clients At aixigo



**Delia Steiner**

Country Manager, Switzerland & Liechtenstein  
**aixigo**



**M**ore than 20 years ago, aixigo – from "exigo" (Greek, "explain") and "aix" from "Aix la Chapelle" (French, "Aachen") - was founded with the vision to "make investors". What does that mean? In the midst of the stock market boom in the late 90s, we envisioned to educate novice investors to enhance their financial literacy regarding capital markets with the help of technology - and research and behavioral finance have played a fundamental role from the very beginning.

Even though our business focus has shifted over the years towards offering a high-performing wealth management platform for the financial industry, these principles are still part of our DNA. We are committed to constantly creating innovative, real added-value solutions that minimize complexity and simplify life for both advisor and client.

We realise this by continuously refining our products together with our customers, geared towards real client needs and emerging market trends.

We have already proven many times that we are a technological leader and a future-proof partner for financial institutions that want to stay ahead of the innovation curve. And our financial planning solution for Switzerland - which luckily also earned us the *WealthBriefing* Swiss Award for "Most innovative client solution" - provides another proof for this. It is built upon our API-based aixigo: BLOXX Wealth Management Platform which provides all technological capabilities for creating individual, innovative and profitable wealth management services in the areas of investment advisory, portfolio monitoring and analysis, portfolio management and financial planning.

Besides, it perfectly matches current market needs, since especially in a world that is more uncertain than ever clients increasingly insist on financial security – which includes reliably planning their financial future.

Clients need the reassurance of being able to map various "what if" scenarios, so that they have peace of mind that no matter what the future holds, their financial soundness is assured. Our financial planning solution enables Swiss advisors to offer financial planning services that perfectly match these clients' needs.

***"We have already proven many times that we are a technological leader and a future-proof partner for financial institutions that want to stay ahead of the innovation curve."***

As an example, aixigo's solution explicitly permits the consideration of the recommended Pillar 3a and allows advisors to easily provide comprehensive and transparent financial advice that sustainably optimises the client's finances and financial future. Fully compliant with Swiss regulations, the solution perfectly balances complexity and simplicity.

Of course, like all aixigo solutions, our Swiss financial planning solution offers unparalleled speed, scalability and flexibility. What exactly does this mean and how is it achieved?

Thanks to powerful algorithms and an in-memory database, aixigo's platform is incredibly fast. This facilitates innovative and digitally supported advisory processes that require rapid data processing such as identifying the best financial paths for clients. Thanks to the API-first approach, the solution allows for quick, easy and seamless integration into existing and prospective infrastructures and services and eliminates the need to use numerous isolated solutions.

In this way, our solutions lay the perfect foundation for banks and financial service providers to counter margin pressure, regulatory complexity and rising customer expectations.



WINNER  
*Leading Individual*

Pierre Gabris - Alpen Partners

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



**Alpen Partners | Alpen Partners International (for US clients)**  
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**Switzerland: +41 58 105 75 50 | USA: +1 212 461 3684**  
**info@alpenpartners.com | info@alpeninternational.com**  
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# Leading By Example At Alpen Partners



**Pierre Gabris**  
Founder and Managing Partner  
**Alpen Partners AG**



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

As an independent Swiss wealth manager with offices in Zurich, Geneva, Lugano, and Bäch/Wollerau, we at Alpen Partners have a very strong commitment to excellence in everything we do. From our entrepreneurial partners to our portfolio management and private clients services team we are focused on providing an exemplary service to our clients from over 30 countries around the world including the United States through our SEC-registered entity, Alpen Partners International. Our services are individualised and we always accept the challenge of finding solutions for even the most complex situations, working together with external experts when required to provide more than simply asset management.

***"Receiving the award as Leading Individual is an honour and to receive recognition for my many years of education, experience, and entrepreneurial spirit is greatly appreciated. As an independent wealth manager, it is great to attract attention from the other awards participants, it puts me as an individual on the map so-to-speak."***

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

Receiving the award as Leading Individual is an honour and to receive recognition for my many years of education, experience, my entrepreneurial spirit, and my leading role as Founder and Managing Partner of Alpen Partners in the Swiss wealth management sector is greatly appreciated. As an independent wealth manager, it is great to attract attention from the other Swiss Awards' participants, it puts me as an individual on the map so-to-speak.

## Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?

The feedback and input from our clients inspire us to develop our offering even further to accommodate their growing, often complex, and evolving needs. Every day we look to our multi-cultural team of all genders, ages, various backgrounds, and fields of expertise...anyone can bring forth ideas, which we discuss.

Increasingly, globally-mobile families come with many additional interests and challenges than simply asset management. Wealth structuring, preparing for wealth transfer to the next generation, family governance, even citizenship and residence planning and relocation are other business sectors, which are integrated into our overall offering.

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

During the next five years we would like to continue to provide innovative solutions to our high net worth clientele, adapting to the next generation of millennial investors and an increasing number of wealthy female entrepreneurs that often have a different approach to investing than their fathers before them.

We will continue to provide and expand our bespoke family office services for our UHNW clients, making their lives easier and more enjoyable.

We want to continue to nurture our pleasant working environment to be able to sustain further growth and an expanding team with emphasis on resilience and being prepared to handle unforeseen events in a calm and well thought out way.

And most of all, in five years' time we would like our present clients to still be with us, as we appreciate long-term, reliable and trusting relationships with our clients as well as with our team members and business associates.

# AW+SWITZERLAND

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



Wealth Briefing **SWISS**  
**AWARDS 2023**

**WINNER**

*Use of Social Media*

**AW+SWITZERLAND**

[americanswelcome.swiss](https://americanswelcome.swiss)

# Raising The Social Media Race In Swiss Wealth Management



**Anne Liebgott**  
 Founder  
**AW+SWITZERLAND**



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

First and foremost, AW+SWITZERLAND (americanswelcome.swiss), a directory of Swiss wealth management and private banking services for US, Canadian, and Latin American citizens, residents, and expats, regularly creates high-quality and visually-appealing content for various social media channels that is attention getting, informative, and to the point.

AWS creates and posts various forms of content highlighting Swiss wealth managers and other Swiss wealth management-related service providers on a consistent and timely basis. LinkedIn is a preferred social network and AWS has a page with over 2,700 followers and Anne Liebgott, Founder, has over 14,200 followers and growing with post views, likes, comments, and shares in the thousands. In addition to social media, relevant content is posted on the AWS platform itself, where the companies are listed.

## **What have been the main obstacles you had to overcome and how did you do so to reach this level?**

Social media is fast-paced and ever-changing. There is an enormous amount of social media content and to stand out requires creativity, consistency, and great timing. In some cases, content can be "repurposed" and adapted to suit various social media channels. It is an everyday challenge to keep up with the newest trends and features.

## **What are the main contributions do you think you bring to the wealth management industry?**

Social media has an increasingly important impact and the majority of the Swiss wealth managers are not social media savvy,

lacking both time and a profound understanding of how the various platforms such as LinkedIn, Facebook, twitter, Instagram, YouTube, and even TikTok, can function to their advantage. AWS takes over the role as content creator and distributor so that the wealth managers and other service providers are not left out on social media.

***"Social media is fast-paced and ever-changing. There is an enormous amount of social media content and to stand out requires creativity, consistency, and great timing."***

## **Where in the world do you operate – are you mainly a domestic player or international?**

AW+SWITZERLAND has a focus on US, Canadian, and Latin American citizens, residents, and expats in their home countries and around the world. AWS has expanded to also include a section on US-based advisors that have an excellent Swiss network including several Swiss SEC-registered wealth managers, collaborating with them to bring Swiss wealth management closer to their domestic clients. AWS will soon include Canada and Latin America-based advisors as well.

## **What does success look like to you – can this be measured in hard numbers, or in qualitative ways, or both?**

While statistics are a great indicator of how much traffic AW+SWITZERLAND receives it is not the real measure of success.

When visitors to the platform browse through the various service providers, find the advisor that they need, and begin a business relationship with them...that is the more relevant measure of success.



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# An Attentive And Flexible Service From Bank Syz



**Nicolas Syz**  
Head of Private Banking  
**Bank Syz**



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

Our successes can be attributed to a culture of strong values and our dedication to providing personalised, high-quality wealth management services to our clients. We are attentive and flexible in the way we serve them. Given our entrepreneurial mindset, we always try to find the best solution for our clients, even if the path to it has not yet been paved.

## What have been the main obstacles you had to overcome and how did you do so to reach this level?

Obstacles are an inevitable reality of every business, in every industry. This has been especially true in 2022, which was an exceptionally complex year for markets globally. But thankfully, we have been able to overcome them through our ability to adapt and evolve, while remaining true to our values.

## What are the main contributions do you think you bring to the wealth management industry?

We believe we bring a unique perspective to the wealth management industry, as a family-owned and managed business created with a will to innovate. We have built our success around the idea of delivering value to our clients, the importance of alternative investments, the democratisation of Private Equity, and most recently the integration of digital assets into a comprehensive portfolio paradigm.

## Where in the world do you operate – are you mainly a domestic player or international?

We are Swiss-rooted, but we operate globally, serving both private and institutional clients, out of four offices in Switzerland and international offices in Turkey, South Africa and a newly created advisory office in Uruguay. Our international development

with offices close to our clients aims at delivering excellent service and investment advice with proximity to our clients.

## What does success look like you – can this be measured in hard numbers, or in qualitative ways, or both?

Success for us is about building and maintaining the trust of our clients through the delivery of value: providing the best possible service, unlocking new investment opportunities, establishing authentic human relationships. Financial results should only come as a consequence.

***"Success for us is about building and maintaining the trust of our clients through the delivery of value: providing the best possible service, unlocking new investment opportunities, establishing authentic human relationships."***

## Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?

As a family-owned and managed private banking group, we look to our family heritage and values as well as to leaders in various industries for inspiration. But perhaps more importantly, we strive to create a culture that encourages innovative thinking within the organisation.

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

In five years, we hope to continue to be recognised as one of the leading independent private banking groups in Switzerland, while expanding our reach to serve more international clients, offering them the best products and services that the industry has to offer.

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| SUISSE

# Great Service To Internationally Active Clients



## Hans-Peter Borgh

CEO

**Banque Internationale à Luxembourg (Suisse)**



### Where in the world do you operate – are you mainly a domestic player or international?

Our clients are internationally active entrepreneurs and families, with a growing focus on clients in Eastern Europe, the Middle East and China. To serve our international clients, BIL Suisse has a presence in the three main financial centres in Switzerland; Zurich, Geneva and Lugano. BIL Group, headquartered in Luxembourg, with a history dating back to 1856, provides a wide array of banking services to individual clients, SMEs and large corporations. BIL Group also maintains offices in Hong Kong and Beijing.

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

BIL Suisse is a boutique bank providing innovative wealth solutions for internationally active entrepreneurs and families, to build sustainable success together. As a boutique bank, we pride ourselves in the agility our organisational set up provides. We have an ambition to grow and further add scale, while aiming to maintain our agility to service our clients efficiently.

### What do you most like about the wealth management industry, and what do you like the least and would most like to change?

I greatly value interacting and working with clients to find creative solutions to their complex problems. Helping entrepreneurs and families to meet both their personal and business banking needs. Assisting clients during major life changes and planning for the future. What I like least about the wealth management industry is that it typically is not at the cutting edge of technological innovation, but that is also changing as new technologies are adopted.

### Can you sum up the philosophy that sums up your firm/you the best?

BIL Suisse is built around the three pillars of Swiss Tradition, European Roots, Eastern Expertise.

**Swiss Tradition** - As a growing boutique bank, we operate from the three main Swiss financial centres of Zurich, Geneva and Lugano. As our operating base, Switzerland is recognised as the world's top international wealth management jurisdiction and global leader for cross-border private banking. Switzerland also enjoys long standing political stability, a strong economy and a safe currency. We are proud to offer our clients a full range of service of a boutique bank with international scale, operating in Switzerland since 1985.

**European Roots** - We are a fully owned subsidiary of Banque Internationale à Luxembourg which, founded in 1856, is the oldest multi-business bank in Luxembourg. Since its foundation, Banque Internationale à Luxembourg and its subsidiaries have played an active role in Luxembourg, surrounding European countries and beyond. Our clients can benefit from the extensive capabilities from our longstanding European roots in Luxembourg, as we provide financial services to help private wealth, financial professionals and businesses flourish.

**Eastern Expertise** - As a bank, we have a strong focus on the key growth markets of China, Eastern Europe and the Middle East, with dedicated teams covering these markets, complementing our traditional markets. We also have a broad network of international experts, including in Beijing and Hong Kong. BIL Suisse is well positioned eastward to support our expanding client base in our key growth markets.



# WHAT WORLD WILL YOU MAKE POSSIBLE?

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 **BARCLAYS** | Private Bank

# Banks Must Bring New Thinking As Wealth Transfer Surges



**Rahim Daya**  
Chief Executive Officer Switzerland  
& Head of Middle East  
**Barclays Private Bank**



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

I was absolutely delighted when I learned that we had won such prestigious awards, which are highly regarded across the financial services industry. These accolades instil confidence in the wider market and are a recognition that our efforts to serve our clients are delivering meaningful change.

*"Perhaps my greatest joy in winning these awards, however, is that it acknowledges the hard work and dedication of my colleagues across the private bank."*

Perhaps my greatest joy in winning these awards, however, is that it acknowledges the hard work and dedication of my colleagues across the private bank. Every day, I am amazed by their unwavering commitment to delivering the best of Barclays through all our products and services.

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

When I took on my role in April 2021, growth was my main priority. In five years' time, I'd like us to be one of the most relevant international private banks in Switzerland, serving multiple markets. We need to build the business as much as we can and have a laser focus on attracting, and supporting, new clients.

If recent geopolitical upheaval has taught us anything, it is that there will always be some degree of volatility in financial markets.

However, changing times can also bring opportunities. Firms which embrace these opportunities can thrive and influence tomorrow with confidence.

During the next five years, I'd also like us continue our collaboration with colleagues across the wider Barclays Group so that we can unleash the power of "One Barclays".

## What do you most like about the wealth management industry, and what do you like the least, and what would most like to change?

During my career, I've always welcomed the opportunity to work with different generations. Within the private bank, there are many examples of client relationships that have lasted for 50 or 60 years, and we hope to maintain these for at least the next 50 years!

However, I often feel that the industry does not do enough to plan for future trends and focuses too much on maintaining the status quo. There is frequently a mind-set that firms should simply retain existing clients for as long as possible. I would like to change how we do this as an industry and evolve our strategy to cater for future generations.

During the next 10 to 15 years, there will be a critical transfer of wealth to the next generation. In order to succeed, private banks will need to bring new ways of thinking to this changing landscape. Old ways of working do not yield new results and we need new results.

Finally, we cannot talk about the future without considering the climate emergency and our duty to leave a better world for future generations.

A close-up, high-resolution photograph of a woman's face, focusing on her eyes which are closed. She has dark hair and is wearing a gold hoop earring with a chain and a teardrop pendant. The lighting is soft, highlighting the texture of her skin and the details of her features.

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**Stéphane Bellac**  
Partner Banking & Capital Markets  
**BearingPoint**



**B**earingPoint is an independent, partner-owned management and technology consultancy with European roots and a global reach. The firm has a global consulting network with more than 13,000 people and supports clients in over 70 countries. Our banking and capital markets practice is especially prominent in Switzerland, with an office in Zürich since 2009 and a growing presence in Geneva since 2018.

We serve domestic and international clients throughout the front-to-back value chain and have strong ties to the industry's technology ecosystem, covering leading software vendors (Core Banking System, PMS, CRM, and more). Our expertise extends to specialised solutions in advisory, wealth planning, and independent asset management. Our clients include universal banking groups, international and family-owned private banks and wealth managers, smaller asset managers, single and multi-family offices, trustees, and administrators.

***"Our success is attributed to several key factors, including our great teams and both individual and collective expertise, as well as our strong relationships with organizations in the industry."***

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

Our success is attributed to several key factors, including our great teams and both individual and collective expertise, as well as our strong relationships with organisations in the industry. These relationships give us a broad understanding of historical strategic and operational decisions, and a holistic view on market trends, enabling us to provide clients with the best market practices. In addition, and complementing the above, our intrinsic open approach to change and our market positioning, which leverages both our business and technical ex-

pertise, allow us to examine challenges and opportunities from multiple perspectives.

**What are the main contributions do you think you bring to the wealth management industry?**

The wealth management industry is certainly an industry that has faced significant challenges in the last decade, due to increased regulations and technology advancements. Within this context, our contributions and expertise are essential as we support organisations to overcome these challenges by providing a fresh perspective, adopting best practices and methodology, and by defining and implementing short to long-term business transformation strategies that lead to improved performance.

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

We aim to not only maintain, but to continuously excel and expand our services, becoming the preferred consultancy for wealth management and private banking technology and management consulting services, all the while upholding the highest quality standards. This includes digital transformation, cloud migration, blockchain-based solutions, asset tokenization, virtual asset financial services, and process mining technology to enhance operational efficiency.

**What do you most like about the wealth management industry, and what do you like the least and would most like to change?**

The highly skilled labour force allows the Swiss wealth management industry to offer high quality sophisticated financial services, regarded as among the world's best. Furthermore, the industry can rely on the timely support and reactivity of FINMA, which introduces necessary regulatory frameworks, as well as on Switzerland's solid political and economic stability.

# Bedrock

REACHING NEW HEIGHTS



Portfolio Management | Asset Management | Family Office

[www.bedrockgroup.com](http://www.bedrockgroup.com)



Bedrock SA, authorised by the FINMA and supervised by the AOS in Switzerland;  
Bedrock Monaco SAM, authorised and regulated by the CCAF in Monte Carlo; and  
Bedrock Asset Management (UK) Limited, authorised and regulated by the FCA in the UK.



# Bedrock Takes Daily Worries Out Of Investments



**Maurice Ephrati**  
Managing Director  
**Bedrock Group**



**B**edrock is a global multi-family office providing innovative investment and advisory services to UHNW families and institutions. Established in Switzerland in 2004, by a team of industry experts as one of the leading independent investment boutiques.

Our goal is to ensure that the financial and non-financial interests of our clients prevail and that their lifestyle needs are reliably met. By being directly accountable, we allow our clients to relinquish the daily worry over their assets while still maintaining personal control over their wealth.

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

Bedrock's investment expertise has been built upon decades of experience working in leading financial institutions and managing prominent families' investment needs.

Our founding partners have 20+ years' experience working together and unlike most Swiss competitors, come from a background in capital markets and treasury management. The strength and breath of our global network enables us to offer privileged investment opportunities and interesting under-the-radar strategies.

Our interests are aligned with those of our clients. We invest our clients' assets alongside those of our partners and their families. Bedrock is 100 per cent privately owned by its partners.

Beyond investment management, we also help clients develop effective family governance structures, think strategically about their philanthropic aspirations, and define the rules of interaction between themselves and their wealth to ensure we are protecting their wealth against more than just market downturns.

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

We are really proud and grateful to have the honour to win such an award and always appreciate the recognition from our peers and the financial industry. It is a testimony to the hard work that all our team members put in and their dedication to putting clients' interests first.

This award is reflective of the quality of service we offer to our clients and showcases to them our commitment to continue servicing them to the highest standards.

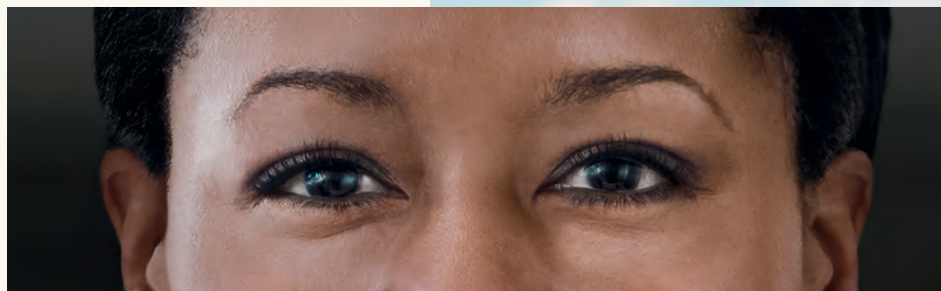
**Where in the world do you operate – are you mainly a domestic player or international?**

Founded and headquartered in Geneva with offices in two other major financial hubs – Monaco & London. Office locations allow us to serve and meet the needs of an international client base – including clients from across Europe, the Middle East & South America.

In Switzerland, we just received a portfolio management authorisation from the (Swiss Financial Market Supervisory Authority).

**Can you sum up the philosophy that sums up your firm/ you the best?**

Our philosophy is built on the belief that we all see wealth differently. Wealth means different things to different people, and as such we tune into what drives each of our clients. We work with families and institutions to see things from their perspective and create bespoke strategies that align with their individual purpose and long-term goals.



# TURN VISION INTO IMPACT

As an investor, you want your wealth to have a positive influence. Through our unique classification system that assesses the sustainability of our investment solutions, you can align your heritage with goals that are close to your heart.

BNP Paribas has been in Switzerland for more than 150 years and was awarded **Best Private Bank in Europe** (WealthBriefing Europe 2022) and **Best Bank for Sustainable Finance** (Euromoney 2022).



**BNP PARIBAS**  
**WEALTH MANAGEMENT**

The bank  
for a changing  
world

# Worldwide Presence And Strong Local Presence

**Beat Bachmann** - Chief Executive Officer for Wealth Management Switzerland & Emerging Markets and **Caroline Gibault** - Head of Offering, Products & Services, **BNP Paribas in Switzerland**



**B**achmann: Switzerland is one of the leading international wealth management centres of the BNP Paribas group. We boast a team comprising private bankers specialised in different geographical areas and products and services, with experts dedicated to our clients.

The position of BNP Paribas as both a wealth manager and banking partner results from the combination of a worldwide presence and a broad offering with a focus on innovative and tailor-made wealth management solutions and credit structuring, as well as the ability to deliver on complex transactions.

## What do you think makes your firm successful in its chosen field?

**Gibault:** The best FX Solution Provider award is the recognition of the expertise of our (FX) desk capabilities. This outcome is proof of our ability to serve our most sophisticated clients with the highest-quality FX systems, products, processes and credit terms. The essence of our offer also lies in the fact that it comes with a high level of personalisation that closely follows the world of wealth management.

## Best Impact Investing Award

Our commitment towards a more sustainable world translates into our wealth management activity through innovating and differentiating services that position ourselves as pioneers with regards to positive impact solutions. We are convinced that a positive change can be achieved by combining the integration of sustainability in the liquid asset classes and the investment in impactful solution-providers.

Among our latest digital innovations, we have the enhancement of our E-banking chat solution, which provides real-time conversations with our clients and a simulation tool for the visualisation of strategic asset allocation. We also launched a new Private Asset Portal (Private Equity & Real Estate), which gives clients a 360° view of portfolios with detailed geographic breakdowns, strategies and currencies available, alongside performance breakdowns for each fund and their consolidated portfolios.

## Where would you like your firm to be in terms of sectors in five years' time?

**Bachmann:** Being "the Preferred Bank for Entrepreneurs & Families (E&F)" and "the Reference Bank for Financial Savings in Europe" are two of our strategic objectives. We are leveraging our team of experts, and we have investment and financial solutions tailored to our clients' needs using our Group expertise.

With our global financial network tapping into the top experts worldwide, we are able to provide very specific expertise to clients, such as structuration and promotion of capital market solutions, direct investments and club deals, niche private asset funds and co-investments alongside our PE/RE funds.

## What would you say is your firm's philosophy?

**Bachmann:** No country, business or individual can win in the long term in a world that loses. BNP Paribas understood the role that finance has to play in the transformation of society twenty years ago, and has been working since then to create new business models.

# The private vault for your Bitcoin and crypto investments

Secure custody and crypto solutions



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Buying and selling, custody, digital estate planning,  
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# Safe Crypto World Enabled By Checksig



**Ferdinando M Ametrano**  
Co-Founder, CEO  
**CheckSig**



## What do you think makes your firm successful in its field?

CheckSig is a fintech firm providing crypto services to private investors and financial institutions. Our mission is simple: enable safe, reliable, and regulated access to the crypto world.

We assist private clients throughout the investment process with a dedicated brokerage desk, custody accounts, crypto tax reporting, and training solutions, always with a personal account manager at the client's side.

Despite the current market turbulence, CheckSig's business continues to grow. In 2022 our client base doubled, driving a significant increase in assets under custody. In a time of uncertainty, clients rewarded our cutting-edge security safeguards, which are unique in the industry.

CheckSig is the first crypto company in the world to provide public blockchain proof that all funds are safely under control. Moreover, CheckSig is one of the few crypto companies to have both insurance coverage on assets (SATEC, Generali Group) and independent auditors (Deloitte, providing us with SOC attestations).

## What are the main contributions you think you bring to the wealth management industry?

CheckSig provides wealth management professionals with the best crypto solutions to meet the needs of the most sophisticated investors. Bitcoin is the best-performing asset of the decade, but as a new asset, it requires new solutions to be properly understood and managed. We offer a concierge-style service where each client is paired with a personal account manager, specialised in crypto-assets and crypto markets.

With CheckSig's expertise and support, professional investors benefit from our assisted trading services: simple, secure, ideal for large transactions.

The custody service protects the clients funds at all times, with the added peace of mind of insurance guarantees. We provide clients with the right tools to comply with the IRS and support for digital estate planning and wealth transfer processes.

At CheckSig we integrate the value of human expertise with the highest level of technological security on the market.

## What is the philosophy that sums up your firm the best?

The key value for CheckSig is the safety of our clients' funds.

CheckSig was born to solve the shortcomings of the crypto sector and meet the specific needs of private clients, wealth management professionals, and financial institutions.

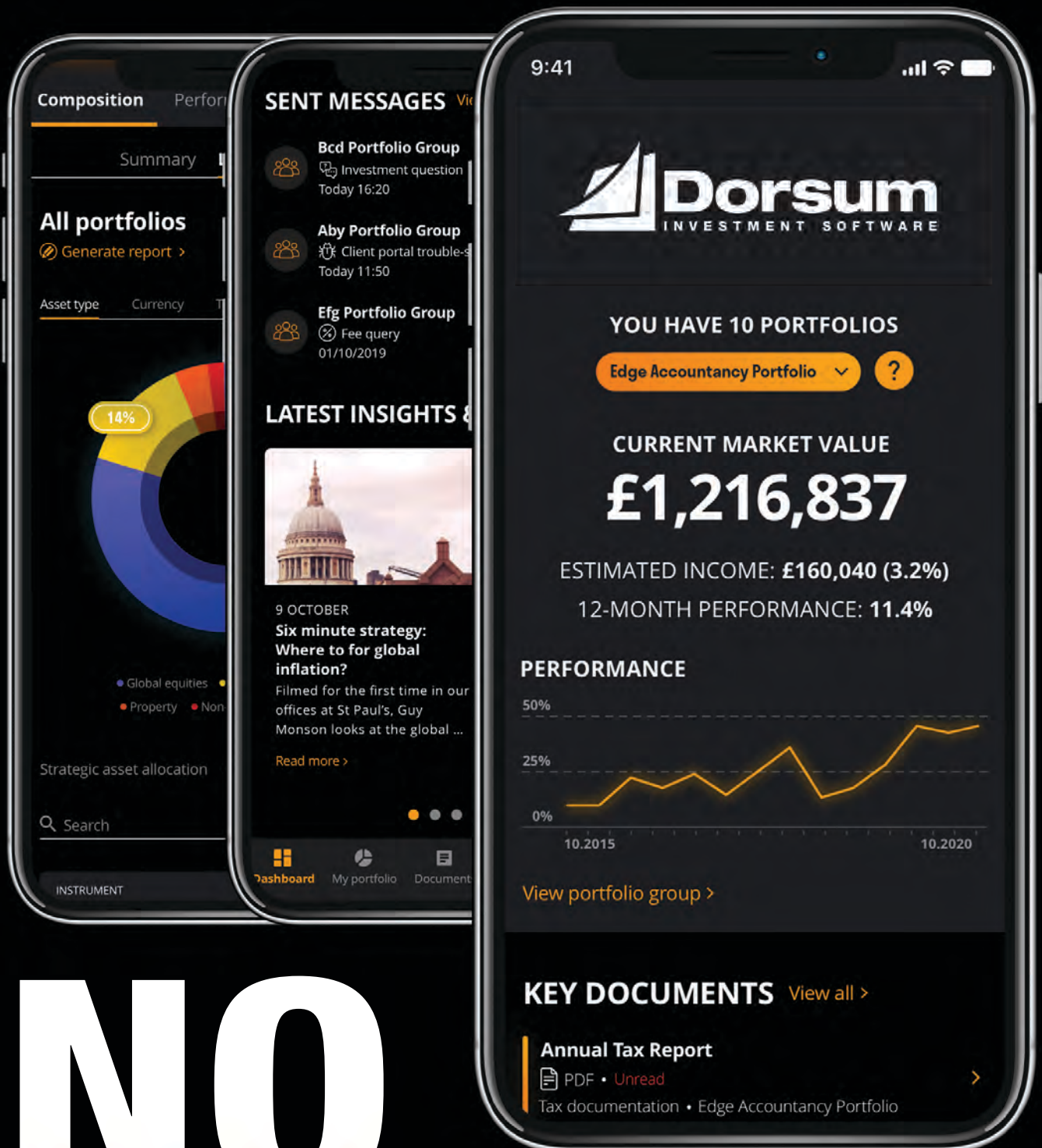
When it comes to crypto, the importance of professional custody for significant amounts is a key concern both private investors and businesses have to face. The risks of self-custody usually outweigh the benefits and have implications in terms of liability, personal security, inheritance, and taxation.

That's why CheckSig has developed and built the safest Bitcoin custody protocol in the world, a state-of-the-art solution for maximum security. In the Bitcoin Script language, the instruction "OP\_CHECKSIG" is used to verify the signatures needed to authorise a transaction.

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

Spotlighting the best crypto companies will support the advancement of the industry and, ultimately, will help investors identify reliable operators and good practices - often not yet documented.

# DORSUM'S WEALTH PORTAL SPEAKS FOR ITSELF.



# NO BUZZWORDS.

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# Rich Experience Builds Trust For Clients At Dorsum



**Adam Fáth**  
Senior Business  
Development Manager  
**Dorsum Ltd**

## What you think makes your firm successful in its chosen field?

Our investment banking and WealthTech expertise of 25+ years gives us the confidence to take on a market-leading role in the industry.

*"We have over 80 live and running regulator-approved systems all around Europe."*

We have over 80 live and running regulator-approved systems all around Europe, so our clients trust our insights on going forward, ensuring that our solutions not only fit their needs, but also provide them with a competitive edge in the market.

## What are the main contributions do you think you bring to the wealth management industry?

Our goal is to modernise the advisor-client experience, pushing the industry towards digital solutions that address the biggest challenges on both sides, without losing the human touch.

## Where in the world do you operate – are you mainly a domestic player or international?

Having outgrown the CEE region, we are now completely focused and committed to international projects mainly in Switzerland and the United Kingdom.

## What does success look like to you?

We measure our success in customer satisfaction, which in turn is measured by our customer's clients' satisfaction.

In the B2B sector it is not enough to deliver something that satisfies our direct customer.

The real measure of a successful implementation must be based on real feedback from the end-users.

## Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?

Tech companies should not be compared to wealth managers directly, however, their approach to innovation and the integrated way in which innovation drives their business forwards is something that our sector should learn from.

## Can you sum up the philosophy that sums up your firm/you the best?

We aim to be the sector's #1 investment software and solutions provider, but more crucially, we want to be a trusted partner for every client.

*"We aim to be the sector's #1 investment software and solutions provider, but more crucially, we want to be a trusted partner for every client."*

Stable, mutually beneficial partnerships are the key to generating higher returns for all.





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**eRI<sup>®</sup>**



# How ERI Supports Wealth Managers In Future-Proofing Business Models



**Jean-Philippe Bersier**  
Director – Business  
Development  
**ERI**

## What are the main contributions you bring to the wealth management industry?

Profitability levels in the Swiss wealth management market have declined in recent years and the trend does not yet appear to be reversing. Compliance costs remain high and new technologies like artificial intelligence or trendy financial products such as ESG investing, private equity, philanthropy and digital assets continue to disrupt the value chain. This is prompting private bankers and wealth managers to review their business models to ensure that all key processes are optimised from front to back office.

Being able to help private banks and wealth management companies digitise their business models to facilitate the delivery of new products and customised digital services with reduced time to market – while keeping their costs and risks under control – is possible with the right financial technology solutions in place.

An agile platform with an open architecture will provide access to a whole new ecosystem of partners through API connectivity; this is also an area of expertise we have developed to meet a need for integrated workflows. We are convinced that this area of innovation will be essential in the years to come to enable wealth management professionals to remain at the forefront of a competitive market. We see a number of “Open Banking” initiatives being launched around the world.

In addition, among the other banking and financial services segments we serve, our private wealth management clients benefit from our SaaS solutions, which free up resources to let them focus on their clients and their growth strategy without having to install and run applications on their own IT infrastructures.

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

Our success is measured by our customers' success. In fact, seeing our customers rewarded for their operational efficiency confirms that we are working together towards the same goal: future-proofing their technology set-up for a better end-user/customer experience.

Closely monitoring market expectations for new functionalities is the basis for developing problem-solving tools that enable our customers to implement streamlined and transparent workflows. Eliminating complexity is one aspect of this success, but it is also crucial for private wealth managers to have access to their clients' data in real time. This allows managers to anticipate clients' needs and offer the tailored approach they are looking for, while empowering them in their decision-making processes through digital tools such as our e-banking.

## What have been the main obstacles you had to overcome and how did you do so to reach this level?

Like our successes, the obstacles and challenges we are facing are those of our clients. Therefore, the constant review and development of new product features is a key pillar of our strategy. It ensures that our customers benefit from solutions that are realistically tailored to their day-to-day use and will also support the great transfer of wealth to meet the needs of the new generation of customers (Generation Z), who approach life goal planning quite differently from their parents.

This means that adapting and re-purposing our solutions remains central to customer lifecycle management, which is particularly true for on-boarding processes that remain heavily dependent on compliance and risk management that must be closely monitored.





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**Etops Group AG**  
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**WINNER**  
*Implementation of a Technology Solution*

**Etops Group**

# Etops Goes Beyond Pure Technology Offering



**Christian Jedlicka**  
Chief Strategy Officer  
**Etops AG**



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

With its range of solutions, Etops goes beyond a pure technology offering. Etops offers a comprehensive ecosystem for the financial industry, which, in addition to the proven and at the same time innovative software solutions, also includes comprehensive services in the areas of back and mid office as well as data interfaces and management.

**What have been the main obstacles you had to overcome and how did you do so to reach this level?**

In fact, it was primarily connectivity issues and, above all, data quality. Our entire platform offering, from PMS to analytics to reporting, is based on data. External asset managers and family offices often work with a large number of custodian banks that need to be connected via electronic interfaces. Unfortunately, the quality of the data delivered is quite variable and the reconciliation effort is high.

**What are the main contributions do you think you bring to the wealth management industry?**

Based on the realisation that the quality of the data used is essential, we have, in addition to establishing operations services, also relied from the outset on the openwealth initiative, which aims to create a uniform standard for custodian bank data in Switzerland. Etops was the first vendor to successfully connect two banks on this basis.

**Where in the world do you operate – are you mainly a domestic player or international?**

Etops has several locations in Switzerland, Germany and Slovakia. In terms of markets, the focus in the past was on Switzerland and Liechtenstein.

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

Of course, for us - as for any privately owned company - values such as turnover rate, profitability or market share are essential benchmarks for success. But factors such as customer and employee satisfaction are at least as important to us.

**Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?**

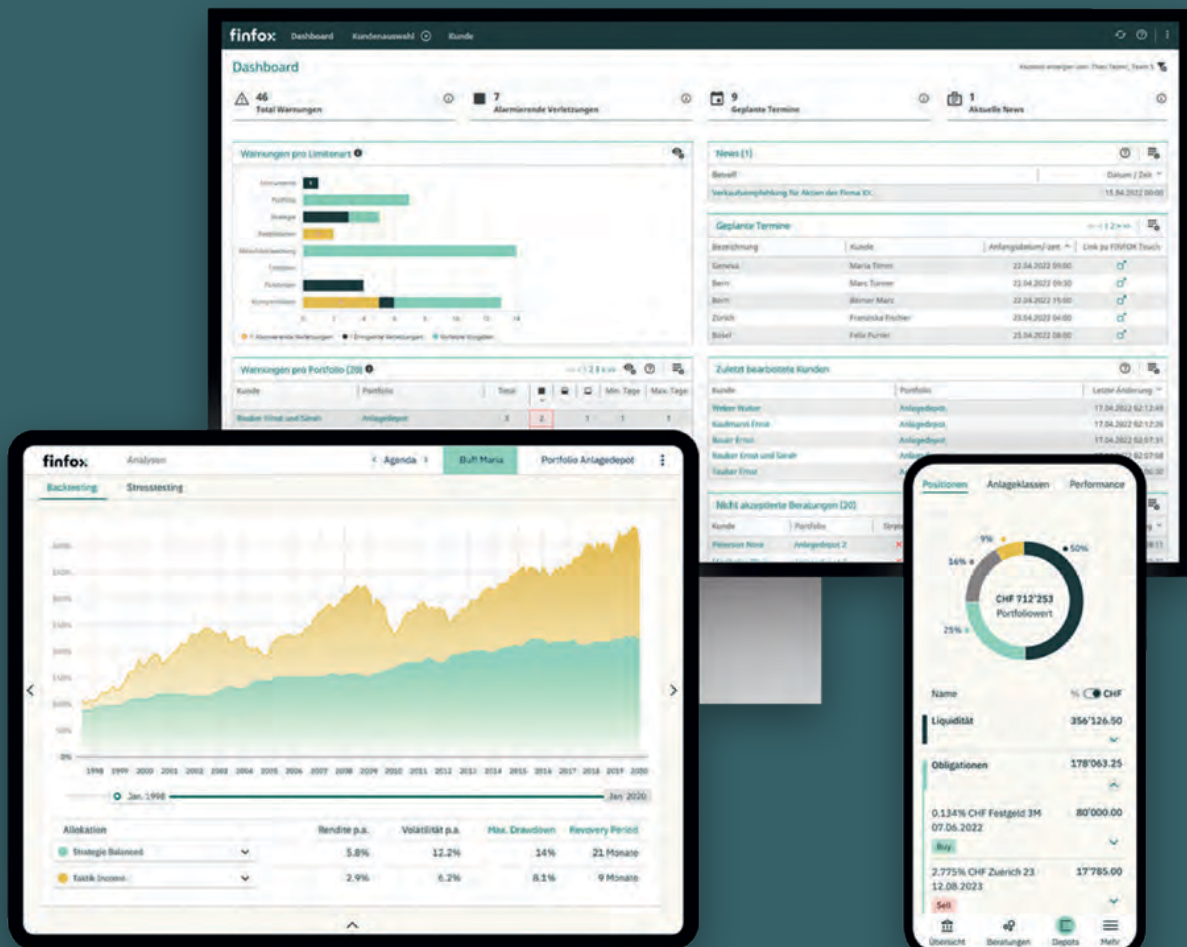
Of course, we monitor our peers, but our major inspiration comes from the screening of trends in investment and wealth management, developments in the private banking sector, but also technological innovations and digitalisation trends.

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

Etops aims to be the leading provider in Europe of a comprehensive platform offering which, based on a flexible central computing core as a kind of wealth management OS, processes and prepares all the necessary data efficiently and to a high standard of quality.

**What do you most like about the wealth management industry, and what do you like the least and would most like to change?**

In recent years, the wealth management sector has been confronted with new challenges time and again, be it new regulators, new market trends such as sustainable investments or extreme market situations.



# Finfox. The award-winning software solution for hybrid investment advice.

The wealth management of the future is both personal and digital. In other words: hybrid. Automated and standardized for the bank, yet perceived as individualized by the client. Supporting client engagement at all touchpoints, effectively conveying the value-add to the client.

Welcome to Finfox. Investment advice redefined.



Find out more

# Taking Advice Up Another Level At Finfox



**Andreas Borg**  
Chief Executive Officer  
**Finfox**

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

We are a Zurich-based wealthtech firm. Our core product is Finfox, a full-service hybrid investment advice solution for banks, advisers and their clients. Thanks to intelligent business logic, a consistent data set and full omni-channel capability, our software makes the advisory process a high-quality, regulatory compliant and seamless experience across all client touchpoints.

With over 35 years of expertise under our belt, we have a deep understanding of complex business requirements as well as broad know-how in designing client-centric solutions and implementing individual configurations.

Private banks, savings banks and Swiss cantonal banks trust in Finfox. We offer solutions for all segments from wealthy to affluent and retail clients.

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

An award like this is a great motivation for us as a company and as a team. It shows that our smart functionalities, customisation options, sophisticated UX and hybrid advice capabilities come together in an outstanding product that resonates in the market.

## **Where in the world do you operate – are you mainly a domestic player or international?**

To date, most of our clients are located in Switzerland and Liechtenstein. However, with our solutions being MiFID II compliant Finfox is also being used for German, Austrian and other international clients.

## **What does success look like you – can this be measured in hard numbers, or in qualitative ways, or both?**

Our software is 100 per cent Swiss made. At the heart of our success is our fully

Zurich-based development team. Lots of our employees have been with the company for more than 10 years, some even for more than 20 years. Our team's commitment and expertise, and of course the trust, quality and depth in the relationships with our clients is what makes us thrive.

## **What do you most like about the wealth management industry, and what do you like the least and would most like to change?**

For a long time, wealth management was known for being mainly focused on wealthy clients. Digitalisation has changed much of that and has led to a democratisation of the wealth management industry.

Today it is much more inventive as before and even grants easy access for small investors to the opportunities that the financial markets have to offer.

Despite these noticeable and far-reaching efforts to democratise the wealth management landscape, a significant part of clients is still reluctant to invest.

***"As a wealthtech provider, our mission is to simplify the wealth advisory processes. Finfox combines a personalised user experience with a highly efficient set-up for the bank."***

As a wealthtech provider, our mission is to simplify the wealth advisory processes. Finfox combines a personalised user experience with a highly efficient set-up for the bank.

## **Can you sum up the philosophy that sums up your firm/you the best?**

Our thought leadership in the area of hybrid investment advice, our eagerness to invest in innovative ideas together with our clients as well as our reliability to deliver as promised are key elements of the Finfox philosophy.





**Geneva  
Management  
Group**

Swiss Precision. Global Solutions.



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# How Deep Thinking And Innovation Works For Geneva Management Group



**Dave Elzas**  
 Founder and CEO  
 Geneva Management Group



**D**ave Elzas, our founder and CEO, vigorously favors innovation and embodies our entrepreneurial spirit since the firm's inception in 2000. Our corporate culture is one of "deep thinking" about the future and providing our sophisticated clients with innovative solutions that withstand the test of time.

Additionally, GMG's thorough and institutional approach to private wealth management has led us to be early adopters of the heavy burdens, and benefits, of being a FINMA licensed manager of collective assets since 2019. This has strengthened our position as a trusted and reliable financial services provider internationally.

## **What have been the main obstacles you had to overcome and how did you do so to reach this level?**

Obtaining our FINMA license in 2019 required operational changes to institutionalise our business. This resulted in a magnitude of mental and operational adjustments which, while stimulating to us as a company, were financially imposing and required us to maintain our previous rapid pace of growth. This effort was dramatically disrupted by the pandemic.

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

Our ambition is to remain relevant, both to our clients and counterparts, and to play a leading role in the rapid consolidation of our industry through acquisitions. We intend to continue to add tangible value to our clients, and remain a preferred place of growth for our employees, partners and future new joiners.

## **What do you most like about the wealth management industry, and what do you like the least and would most like to change?**

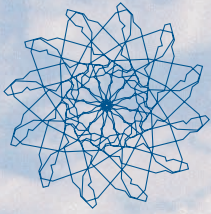
Entrepreneurs and SMEs are the real engine for growth throughout societies. As an independent wealth manager, we interact with and support hard working people and enterprises in so many industries as they monetise their commercial successes.

Understanding their varied circumstances and needs forces us to remain astute and curious regarding their challenges in order to provide them with intelligent financial solution and investment opportunities which suit them.

We, the Geneva Management Group, are optimistic about our role in the financial services industry and in promoting positive change and making meaningful contributions to those who entrust us with their wealth planning needs and investment requirements. The new regulatory environment which affects our industry positively has set the bar higher as it forces its participants to perform in a more transparent and efficient way for its clients.

## **Can you sum up the philosophy that sums up your firm/you the best?**

The Geneva Management Group's philosophy revolves around people and continuous growth. More than ever, we are interested to attract new collaborators and teams who share our enthusiasm for work and result oriented solutions, who come to us with skills, ideas and passion for success.



# lemania

pension hub



#### Rewarding innovation

lemania's 100% digital pension platform is the first in Switzerland to include a dedicated pension fund. Launched four years ago in a rapidly changing wealth management market, this remarkable innovation has now been recognized with a Wealth Briefing Award, which highlights our know-how, leadership and commitment to creating the solutions of tomorrow.



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# Pension Fund Excellence At Gonet & Cie SA



**Nelson Santschi**  
Wealth & Investment Solutions Officer  
**Gonet & Cie SA**



Vesting solutions are frequently required to deal with employment mobility, job changes, early retirement, divorce, and career breaks before retirement in a workplace that is constantly becoming more dynamic. The retirement capital that an employee has built in one or more pension plans during their working life may be released in the form of vested benefits whenever any of these circumstances arises.

By submitting an application to a vested benefits institution, it is possible to keep these benefits under the second pillar system.

The lemania-pension hub is a fully digitalised platform that was created at the initiative of Gonet & Cie SA with the support of the Mirabaud Group. It was the first pension platform to include a dedicated pension fund. Both the Lemania-pension hub and the Lemania-Pension Fund, backed by the Pictet Group, were launched the 26th September 2018.

The Lemania-Pension Hub was the first pension platform to introduce a digital onboarding solution in 2019 thanks to its DCOB technology (digital client on-boarding). It has developed relationships through white labeling with reputable partners within Switzerland.

Its unique concept was envisioned by the three hereby foundations operating in the Swiss pension industry:

- the FLLP vested benefits Foundation;
- the FCDE extra mandatory Foundation;
- the FRPI private pension Foundation;

End users are entirely independent throughout the entire process thanks to the utilization of automated procedures such as our RPA and APIs, from the moment they click to begin the digital

onboarding process, using our digital signature mechanism, to the point at which new accounts are created in our database. Depending on the user's risk level, a variety of investment choices will be offered to them.

Gonet & Cie SA was awarded as the best "Investment Management Platform" in 2022 during the *WealthBriefing Swiss Awards*. Ever since, lemania-Pension Hub has established additional standards to encourage expansion and streamline operations in order to keep its position as the market leader.

***"We are proud of our progress and of our latest achievements. For instance with the integration of our new RPA process (Robotic Process Automation) which allows us to onboard clients at a tenfold rate."***

Commenting on the firm's triumph, Alexandre Michellod, Member of the Executive Committee and Head of the Wealth and Investment Solutions department, Gonet & Cie SA said:

*"We are proud of our progress and of our latest achievements. For instance with the integration of our new RPA process (Robotic Process Automation) which allows us to onboard clients at a tenfold rate. We are looking forward to our exponential growth in 2023 and our future partnerships within the market."*

The platform offers a comprehensive range of individual and occupational pension solutions. The qualitative objective of the platform is to enable end beneficiaries to build up their pension savings on the basis of an open structure of investment funds as well as offer a digital interface for pension advisors and their clients that is easy to use and understand using of a "weather forecast" for mutual funds.



**GreenLock**

# One hub to manage all investment fees

Greenlock delivers an end-to-end automated solution to aggregate and reconcile investment fee streams.

We focus on efficiency by analysing your total cost of investment and benchmarking the individual fee components against industry-leading practices

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Email: [contact@greenlock.io](mailto:contact@greenlock.io)

**Greenlock AG**  
Hinterbergstrasse 49 CH 6312  
Steinhausen, Switzerland

# A “Dream Team” Blend Of Talents At Greenlock



**Katya Krylova**  
Senior Advisor To The Board  
**GreenLock AG**

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

People are unequivocally GreenLock's main advantage in making the company successful.

*"We are lucky to gather a 'dream team' coming from very different backgrounds: from advanced analytics and machine learning experts to private banking specialists and professional commercial negotiators."*

We are lucky to gather a “dream team” coming from very different backgrounds: from advanced analytics and machine learning experts to private banking specialists and professional commercial negotiators.

*"The synergy of these skills helped us to build a unique product that haven't existed in the market before."*

The synergy of these skills helped us to build a unique product that haven't existed in the market before.

**What are the main contributions do you think you bring to the wealth management industry?**

This platform helps investors achieve full transparency on how much they pay in fees across every single intermediary in their investment ecosystem.

We have developed an analytical platform to automatically consolidate, benchmark, and monitor the total investment fees across an entire value chain (custodians, intermediaries, investment managers, brokers, etc).

**Where in the world do you operate – are you mainly a domestic player or international?**

GreenLock has its root in Switzerland but quickly expanding to European and UK clients.

At the same time, we see the fee opacity issue manifest itself in other major geographies as well. It is a question of time when we set our services in action in North America, Asia, and the Middle East.

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

GreenLock is aiming to be a leader in the investment fees management sector with worldwide representation and steadily growing cash flow.

Ideally, we will set up fee management (which includes fee capturing, fee analysis, and fee reduction strategy & execution) as a new industry standard across the entire financial sector.

*"Theodore Roosevelt said: 'Keep your eyes on the stars, and your feet on the ground', while we say, 'Keep your eyes on the stars, and your fees on the ground!'"*

Theodore Roosevelt said: “Keep your eyes on the stars, and your feet on the ground”, while we say, “Keep your eyes on the stars, and your fees on the ground!”





**HSBC**

Global Private Banking

# An Exceptional Culture Of Client Service At HSBC



**Georgios Leontaris**  
HSBC CIO for EMEA  
**HSBC Private Bank (Suisse) SA**



**H**SBBC is proud to have won Swiss *WealthBriefing Awards* this year for our fixed income offer as well as recognition for our EMEA chief investment officer, Georgios Leontaris.

HSBC has a long standing presence in Switzerland, and our global scale and international presence provides unique investment opportunities both at home and abroad. Our deep roots in Asia as well as our extensive presence in Europe, the Middle East and the Americas means we always speak our clients' language, understand their business and investment needs and can provide a world of opportunities.

HSBC Global Private Banking and Wealth is a leader in the ultra-high net worth segment. Our distinguished capabilities in alternatives, lending and fixed income are part of our key product offerings and our close collaboration with our asset management, markets and commercial banking divisions offer a unique advantage to clients for bespoke and global solutions. At the heart of our offer is our exceptional culture of client service.

On the fixed income side, we are able to offer a unique advisory proposition within the private banking investment landscape. We drive success by listening closely to the needs of our clients and making ourselves and our knowledge available to them, with processes fully designed around clients. We are fortunate to have a team with diverse backgrounds and skills, which has allowed us to create tools to make our risk management and portfolio positioning not only more efficient but more relevant to our clients.

A variety of nationalities on the fixed income team enables us to access different cultural points of reference for the service of our clients. Our team and investment strategies are adaptable, and we pride ourselves on being able to create portfolios tailored to clients in both high and low-yield bond environments.

Looking across asset classes, our experienced chief investment officer team formulates HSBC's house view, tapping into the expertise across the group in economic research, equities, bonds, currencies, commodities, hedge funds, real estate and private markets.

We are proud that Georgios Leontaris, CIO for EMEA, has been awarded for his expertise in defining and delivering the investment view across Switzerland and EMEA.

**Focus: Georgios Leontaris, HSBC CIO for EMEA, Wealth Management Rising Star under 40**

**What are some of the key drivers of your career so far?**

I have encountered many interesting challenges in my career and I have particularly enjoyed building continuous improvements to our offer. Our clients should be at the heart of what we do, and we have built powerful tools to help identify and map investment opportunities based on our CIO views.

***"Our clients should be at the heart of what we do, and we have built powerful tools to help identify and map investment opportunities based on our CIO views. Teamwork and collaboration are other pillars along my career journey which have helped me reach this level."***

Teamwork and collaboration are other pillars along my career journey which have helped me reach this level. We have a fantastic collaboration between our CIO team, product specialists and investment counsellors which, again helps us to ensure we are able to match our clients' unique and individual needs.

**WE FOCUS ON RESPONSIBLE FINANCE  
SO YOU CAN FOCUS ON SUSTAINABLE WEALTH.**



## *Architects of Wealth*

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 10 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 Finanziaria SA  
3, Via Ferruccio Pelli - CH-6901 Lugano

[ca-indosuez.ch](http://ca-indosuez.ch)

**CA** **INDOSUEZ**  
WEALTH MANAGEMENT

**CRÉDIT AGRICOLE GROUP**

# Enacting Positive Change In Wealth Management Industry



**Marc-André Poirier**  
Chief Executive Officer  
**Indosuez Wealth Management in Switzerland**

## Whom do you look to in terms of ideas and inspiration?

CSR has been at the heart of Cr dit Agricole's mission for over 20 years. Since 2019, CSR has been integrated into the Group's entire strategy of "Working every day in the interest of our clients and society", embodied in its Ambitions 2025 project.

Within Indosuez, we have very clear objectives which aim to support our clients in their environmental and social commitments beyond a purely financial approach and aid in the green transition. To achieve this, we have integrated ESG criteria into all our processes and created a full range of responsible investment solutions for our clients.

## What are the main contributions do you think you bring to the wealth management industry?

Our Societal Project is at the forefront of enacting positive change within the wealth management industry and is an essential component of our corporate strategy. To achieve its ambitions, we have set up a dedicated global business line and built a comprehensive and innovative sustainable development offering. The aim is to strengthen the product dimension of our Societal Project and to support volunteer- or foundation-led solidarity initiatives.

Since 2012, the Indosuez Foundation has financed 30 environmental projects with a high economic and social impact for vulnerable communities in Switzerland and around the world. Through its corporate volunteering programme, Citizen Days, the bank also allows employees to volunteer for one day each year at selected charities instead of working at Indosuez. In 2022, nearly 300 employees took part in this programme.

These initiatives are catalysts for personal and professional development, and are a way to reinforce the bank's culture of philanthropy and social impact. In addition,

they provide Indosuez with additional expertise, allowing colleagues to further promote responsible and impact-based finance and philanthropy to clients.

Indosuez also acts to preserve and promote culture in Switzerland, partnering with the prestigious Ballet du Grand Th atre de Gen ve and the Association Art-en-Vieille-Ville, a collaboration between fifteen renowned art galleries and cultural institutions in Geneva.

Some of Indosuez's charitable initiatives are long term, while others are organised in response to emergencies. For example, in March 2022 the bank engaged in a project to collect much needed basic provisions for those fleeing the war in Ukraine and assisted a number of other charitable associations committed to helping refugees.

## You told us about your Societal Projects but can you tell us which kind of diversity programmes your firm supports within the Human Project?

Diversity is at the heart of our Human Project and is enshrined in our Equal Opportunities Charter. We have initiatives to raise awareness of the importance of gender diversity in management bodies, and a leadership mentoring programme, which is set to be renewed in 2023. Our female employees benefit from a comprehensive training plan, and in 2021 we set up a development programme for early-career women. At the end of December 2021, 30 per cent of Indosuez's senior management were women, evidencing the relevance and effectiveness of its proactive gender strategy.

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

Our goal is to become the preferred socially responsible employer in the wealth management industry. To that end, we are making every effort to provide our employees with a working environment where high standards and performance go hand in hand with trust, development and respect.



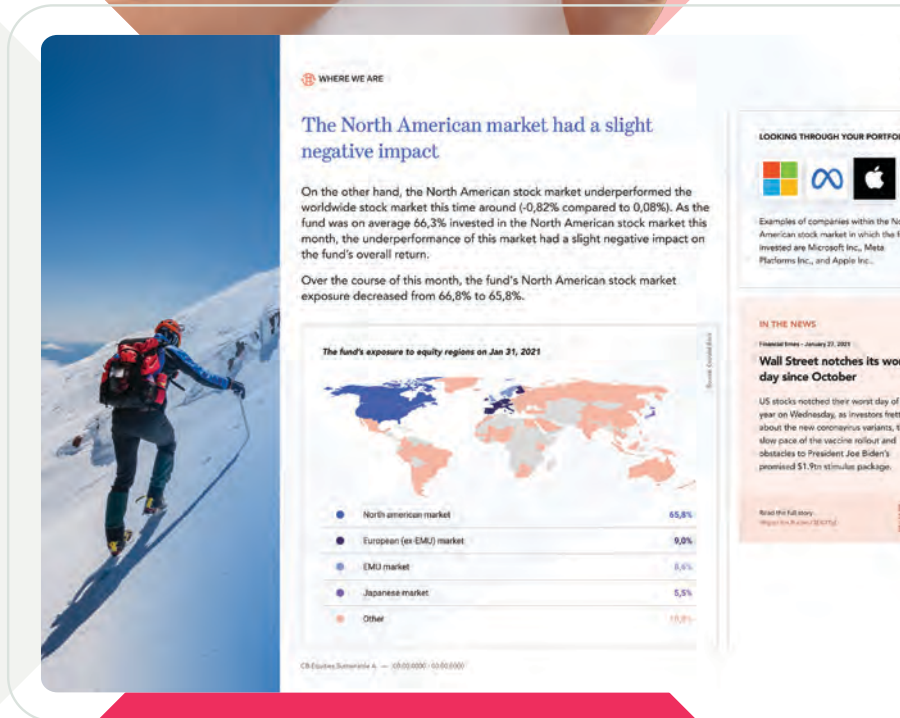


\_STORYTELLER

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 **InvestSuite**

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# Success By A Unique Mix Of Talent And Technical Excellence



**Bart Vanhaeren**  
CEO  
**InvestSuite**



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

It begins with our people - a unique mix of left and right-brain individuals combining technical excellence with world-class creative talent. Moreover, our management team has award-winning digital platform expertise from previous experiences in the finance and wealth management industry.

Setting us apart in the industry is our comprehensive suite of cutting-edge solutions for easy investing. With our solutions - Self Investor, Robo Advisor, Portfolio Optimizer and StoryTeller -, we cover the entire investing spectrum from "do it yourself", "do it together", and "do it for you". This approach has provided significant value to our B2B clients.

## **What are the main contributions you think you bring to the wealth management industry?**

With our white-label solutions, we enable financial institutions to democratise investing, making it accessible to every person in the world in a responsible way through their own trusted brand.

Our InvestTech solutions bring much-needed financial clarity, help improve financial literacy for the end customer, and drive success for our clients.

## **Where in the world do you operate - are you mainly a domestic player or international?**

We have always had a global mindset. Although we started our business in Belgium, we never wanted to limit ourselves to that specific country. Today, we are present in Europe and the Middle East and are taking our first steps in the US and Africa. It is our goal to continue to grow globally.

## **What does success look like to you - can this be measured in hard numbers, or in qualitative ways, or both?**

Success is relatively simple - a happy client with happy customers. But undoubtedly, for us, it is more than that. We want to help our B2B clients win by providing solutions that will retain their customers, activate their balance sheets, and increase assets under management.

## **Can you sum up the philosophy that sums up your firm/you the best?**

Driven by our goal to help democratise wealth management, we pursue a philosophy of innovation, transparency, and growth. We are client-focused in everything we do. Building an in-house digital investment platform requires significant resources, including time, knowhow, and money.

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

It is an enormous recognition, and shows that we are on the right track. Moreover, an award such as this one is very motivating for our investors, stakeholders, clients and employees. Especially for the StoryTeller team of course, since they have worked so hard on this solution, a true innovation in the sector. In essence, StoryTeller leverages technology and storytelling to generate hyper-personalised, narrative-based insights on portfolio and fund performance.

## **Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?**

If there is one company that inspires us, it is Pixar. The combination of mind-blowing technology and amazing creatives has always been a source of inspiration.

**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.

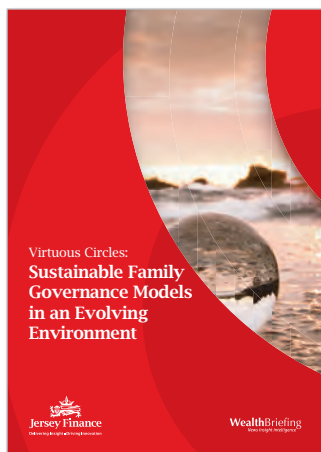
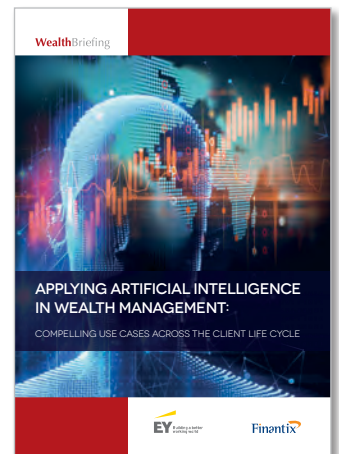
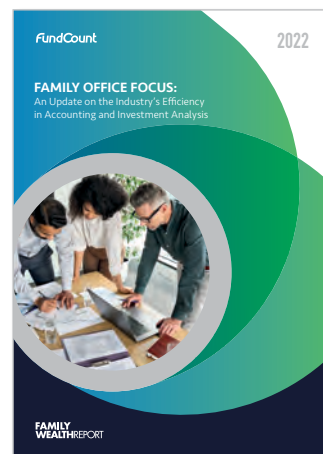
**Virtuous Circles: Sustainable Family Governance Models in an Evolving Environment**  
(in partnership with Jersey Finance)  
Essential reading for UHNWs and their advisors, this report unites the findings of a global survey of practitioners and the views of a panel of experts drawn from leading firms, but perhaps most interestingly of all, the paper features a wealth of real-world examples illustrating what forward-thinking families are doing to create lasting legacies.

**Winning Women in Asia-Pacific**  
(in partnership with VP Bank & Hywin Wealth)  
Asia-Pacific's wealthy women represent a

highly attractive target client group. Yet, they remain an underserved one in many senses in spite of their growing financial power and pronounced need for professional advice. Our second report examining women's specific needs presents truly actionable insights drawn from interviews with H/UHNWs and their advisors right across the region.

**Technology & Operations Trends in Wealth Management 2022**  
(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 2022**  
(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.



# Uncorrelated Returns In Tough Markets Prove Winning Formula



**Manuel Garzelli**  
CEO & Partner  
ITERAM Capital SA

## What do you think makes your firm successful in its chosen field?

Despite global economic uncertainty and highly volatile markets, ITERAM Capital has been able to consistently deliver uncorrelated returns to our clients. A part of our success is our strong understanding and passion of the alternative industry, focus on risk-adjusted returns and the diversification of our offering into hedge funds, private debt and venture capital to strengthen our clients' portfolios.

Additionally, our robust investment and operational teams have been instrumental in ITERAM's persistent success, supported by our continuous investment in technology to streamline workflows and increase efficiency.

## What have been the main obstacles you had to overcome?

Clearly the most recent challenge was to navigate in an unprecedented market environment due to central banks ultra-loose monetary policies, COVID-related disruptions, commodity supply shocks, and growing geopolitical risks. In the hedge fund vertical, we have been well positioned in the commodity sector and have captured alpha opportunities in the fixed income and foreign exchange markets which have been beneficial to our clients.

## What are the main contributions do you think you bring to the wealth management industry?

Given the current financial and macro-economic environment and uncertainties that lie ahead of us, we can bring accessibility to singular and high-quality alternative strategies that could provide differentiated and truly uncorrelated return stream to investors. Alternatives have been perhaps excessively overlooked by the wealth management industry in the past decade due to central banks actions that have pushed traditional risk assets higher and distorted most of the asset prices.

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

This is an outstanding recognition and achievement for the whole team at ITERAM. It is an endorsement of the hard work, commitment and excellence of the team that have been key in delivering a highly institutionalised organisation coupled with a strong governance.

## Where in the world do you operate - are you mainly a domestic player or international?

Our headquarters and operations are in Geneva, Switzerland however we rely on our broad network to offer investors a global reach by investing globally with a focus in the US and Europe.

## What does success look like you?

Success for us means having exceeded our clients and partners expectations by providing first class alternative investment solutions that improve the solidity of their portfolios and give diversification.

## Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?

There are several personalities and companies that inspire us however we have a particular admiration and respect for Stanley Druckenmiller's extensive experience and spectacular track-record since the eighties.

We often listen and read Stanley's views and his insightful advices to always question ourselves regarding our investment and risk management framework.

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

We aim to become a reference in the alternative asset management industry by providing a best-in-class investment platform dedicated to alternatives.





**WINNER: ERI Bancaire**



**WINNER: Finfox**



**WINNER: Geneva Management Group**



**WINNER: HSBC Private Bank (Suisse) SA**



**WINNER: Indosuez Wealth Management**



**WINNER: InvestCloud**



**WINNER: InvestSuite**



**WINNER: ITERAM Capital SA**



**WINNER: Lombard International Assurance**



**WINNER: Leo Trust Switzerland AG**



**WINNER: Lombard Odier**



**WINNER: Lynceus Partners**



**WINNER: ONE swiss bank**



**WINNER: Piguet Gallard**



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# Relentless Focus On Providing Bespoke Services



**Dr. Roderik J. P. Strobl, TEP**  
Managing Director  
**Leo Trust Switzerland AG**



**L**eo Trust Switzerland AG is a leading fiduciary services provider with its headquarters in the centre of Zurich, Switzerland. It has been serving its clients as a market leader since 1980. Its innovative and foresighted strategy places it as one of the leading pioneers in compliant crypto-asset protection and wealth planning services for private and institutional clients.

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

Our clients are very important to us and different from each other. In practice, everyone requires a bespoke approach based on competence, benevolence, and integrity. This is what our experienced employees and the management provide, making the client/customer journey unique.

**What have been the main obstacles you had to overcome and how did you do so to reach this level?**

Although we consider obstacles as opportunities in our customer journey approach, the main obstacles we have overcome are related to the constantly changing market and regulatory requirements.

**What are the main contributions do you think you bring to the wealth management industry?**

Our management and key employees are predominantly full members of the Society of Trust and Estate Practitioners (STEP). They are actively involved in shaping the Swiss sector of this industry by participating in or leading Swiss expert groups (cf. consultations on project law of Swiss Lex Trust) and as expert reference persons at conferences important to the wealth management industry.

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

This award gives the firm an extra cutting edge. It is like receiving an Oscar: you will always be remembered for it.

**Where in the world do you operate – are you mainly a domestic player or international?**

We operate in Zurich, Lugano, Nicosia and Panama City.

**What does success look like to you – can this be measured in hard numbers, or in qualitative ways, or both?**

We use qualitative and quantitative-focused approaches for our clients to ensure the best customer experience. The same approach is also used when evaluating the management and our employees.

**Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?**

We are inspired by our clients and other relevant stakeholders such as partners we work with.

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

To become the fiduciary company with the highest client and employee retention in Switzerland and the most agile digital assets solutions provider.

**What do you most like about the wealth management industry, and what do you like the least and would most like to change?**

We are client-focused and therefore our clients come first. The private and institutional wealth management industry is exciting because there are so many new things to learn each day.

**Can you sum up the philosophy that sums up your firm/you the best?**

Our services are based on competence, trustworthiness and proactivity. Our mission is based on connecting our clients' visions with our expertise.



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# Expertise In Evaluating Banking Partners



**Benoit Schroll**  
Executive Director  
**Lexton Stanley**



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

Our success is built upon our team's expertise in evaluating banking partners, and finding the right fit for our clients and candidates. We take a thorough and diligent approach to each placement, carefully evaluating important factors such as the candidate's professional, client relationship management history, investment management experience, financing needs, and more.

**What have been the main obstacles you had to overcome and how did you do so to reach this level?**

The year 2022 brought with it many challenges in the world of wealth management recruitment, but Lexton Stanley persevered. Our process for supporting private banker candidates is quite extensive and involves examining a range of critical factors, such as track record, customer demographics, investment objectives, financing requirements, and the assessment of their book's pricing, compliance, and key client relationships.

**What are the main contributions do you think you bring to the wealth management industry?**

We believe that our dedication to providing thorough research and a well-defined search process sets us apart in the wealth management industry. We understand the importance of finding the right fit for both the client and the candidate, and work closely with our clients to establish their goals and needs.

**Where in the world do you operate – are you mainly a domestic player or international?**

At Lexton Stanley, we operate on an international scale, but we have a special focus and expertise in the Swiss market, particularly in the Zurich and Geneva areas, as well as the Luxembourgish recruitment market.

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

Success to us means more than just numbers and figures. Of course, meeting our clients' needs and achieving their hiring goals is a significant part of our success, but we also measure it through the satisfaction of both our clients and candidates.

*"Our success is built upon our team's expertise in evaluating banking partners, and finding the right fit for our clients and candidates."*

**Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?**

At Lexton Stanley, we look to stay informed and inspired by following a variety of different business sectors and industries. While it's important for us to have a broad understanding of what's happening in the world of business, we also make sure to go deeper in our understanding of trends that could potentially affect our own industry of wealth management.

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

We aspire to become a leader in European wealth and asset management recruitment, and to establish ourselves as a recognised challenger in Asia and the Middle East.

**What do you most like about the wealth management industry, and what do you like the least and would most like to change?**

As a member of the wealth management industry, I am drawn to the opportunity to support the growth and success of our clients, particularly in the area of wealth generation.



LOMBARD  
INTERNATIONAL  
GROUP

*30+ years of making legacy count*

# Providing tailored and flexible wealth planning solutions

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Our 30+ years' experience means that we have established a thorough understanding of UHNW clients' unique requirements, to help them and their trusted advisers navigate an increasingly complex world, dynamic financial markets and shifting regulatory regimes. Our highly specialised teams, located across key international wealth hubs, design and deliver tailored wealth solutions that are rooted in deep local knowledge. This enables us to provide a truly bespoke service on an unparalleled scale, helping our clients to ensure their assets best serve them now, and in the future.

Learn more about our solutions:  
[lombardinternational.com](https://lombardinternational.com)

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**UK resident holders of policies issued by Lombard International Assurance S.A. will not be protected by the UK Financial Services Compensation Scheme if Lombard International Assurance S.A. becomes unable to meet its liabilities to them.**

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# Expertise Across Borders Wins For Lombard International Assurance



**Simon Gorbett**  
Director, Head of  
Wealth Planning  
**Lombard International  
Assurance**

**L**ombard International Assurance is the leading European provider of customised insurance-based wealth, estate, and succession planning solutions for upper affluent, high net worth and ultra-high net worth 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, that offer flexibility, portability, asset diversification and protection. Our wealth structuring solutions department includes a team of experienced lawyers, tax and estate experts, actuaries, and insurance and investment professionals, who are recognised as thought leaders and create tailor-made solutions that we deliver across all the geographies where we operate.

Our 30+ years' experience means we understand what matters when it comes to protecting and preserving wealth today, so that it can be passed on to future generations. That's the very essence of our value proposition with exceptional technical experts to manage cross-border complexities, individual needs and unique requirements.

#### **Where in the world do you operate - are you mainly a domestic player or international?**

HNW clients have family, wealth, and interests in numerous different jurisdictions across Europe and the world, and with global lifestyles come a host of sophisticated needs which are further complicated by continually evolving legal and tax frameworks.

With a presence in 10 cities, we have an internationally diversified footprint serving over 20 markets across Europe and the wealth hubs of Asia and Latin America via our European carriers. Our 400+ colleagues specialising in

multiple jurisdictions cover more than 30 different languages.

Our solutions are adaptable to the most complex of situations, and their robustness and flexibility make them highly complementary to other international wealth management solutions.

#### **What are the key trends you're seeing that are impacting your industry?**

The last few years have seen a demonstrable increase in the complexity that wealthy individuals and families face as they navigate an uncertain global economy.

These complexities have led HNW and UHNW families to re-evaluate their existing planning. This is where we come in. Our innovative solutions provide flexibility and choice to our partners and clients.

Non-traditional and alternative assets continue to be recognised as a diversification tool, and as a means of investing in the real economy.

Finally, we have also witnessed a growing awareness and interest in ESG from HNW clients. Our role as specialist cross-border wealth planners is to guide our clients through their current hesitation and secure a wealth plan suitable for their lifestyle.

#### **How is your company positioned in the wealth management industry?**

We are in a privileged position to further wealth management practices and we partner with clients' trusted advisors, whether they be private banks, family offices, independent wealth and/or financial advisors, 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.



## INNOVATION and EXPERTISE to navigate FINANCIAL MARKETS



We  
generate  
ideas

We advise and support our clients through a rigorous investment process relying on our deep experience on financial markets and the help of cutting-edge technological tools.



We  
design  
bespoke  
solutions

We create cross-asset and multi-currency investment solutions and help our clients make sound investment decisions according to their specific needs.





We  
level up  
your  
business

ARGO, our digital platform ensures efficient monitoring and accurate reporting of your investments by enabling timesaving through automation of several processes.

### Contact us:

 [info@lynceus-partners.com](mailto:info@lynceus-partners.com)

 +41 22 870 95 00

 Rue Rousseau 38  
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 [LYNCEUS-PARTNERS.COM](http://LYNCEUS-PARTNERS.COM)



# Top-Notch Service Throughout A Client's Investment Journey



**Gregory Leveillé Nizerolle**  
Managing Director Switzerland  
**Lynceus Partners**

**L**ynceus Partners is a global firm, headquartered in Switzerland with a particular expertise in alternative investments and structured products.

*"This award will boost the confidence of our team, and also our clients - it adds another noteworthy accomplishment to our records."*

We offer an end-to-end service throughout the entire investment process, where we continually advise and help our clients to achieve their goals. All of them have access to ARGO, our proprietary digital platform, to monitor their investments in the fast-paced financial environment. Our in-house technology offers clients unparalleled insight and efficiency allowing them to use all the information and support they need from our specialists alongside a tailor-made investment product that matches their investment constraints.

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

This award will boost the confidence of our team, and also our clients - it adds another noteworthy accomplishment to our records. We are honoured to have received this award and it stands as both a testament and a reminder of our efforts, the strength of our team, and our innovative Fintech DNA. We hope that we can continue to provide top-tier service to the wealth managers we serve and fuel our global growth.

**Where in the world do you operate - are you mainly a domestic player or international?**

We always believed in growing and operating internationally. Our firm ethos originates from the Greek mythology of Lynceus, a Greek Argonaut from a band of heroes aboard the Argo ship.

And as they did, we also have set sail and are navigating into different regions around the world.

To date, we have seven offices operating in Europe, Africa, Asia and the Middle East. Lynceus Partners boasts over 50 employees with decades of experience, who have worked in major financial centres across the world. This, plus our extensive network of 1,900 Investors and over 30 partnerships with the majors Investment Banks in the world solidifies our international presence.

Our global expertise allows us to offer a real support to our clients worldwide, along with the ability to adapt to local markets whilst giving access to additional product offerings that clients wouldn't normally have access to.

*"The primary focus at Lynceus Partners is to find solutions regarding the financial needs of our clients - we are not just in the financial business, we are also in the people business. We make every innovative idea turn into an innovative investment journey."*

**Can you sum up the philosophy that sums up your firm/you the best?**

The primary focus at Lynceus Partners is to find solutions regarding the financial needs of our clients - we are not just in the financial business, we are also in the people business. We ensure that client needs are met with tailor-made solutions and offer our support throughout the entire process so that we can build long lasting relationships whilst also offering hands-on expertise in the structured product industry and cutting-edge technology to improve efficiency and simplify complexity. At Lynceus Partners, we make every innovative idea turn into an innovative investment journey.





# ClearView

## Financial Media

### PUBLICATIONS

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## WealthBriefing

*News Insight Intelligence*

*WealthBriefing* is the leading subscription-based business intelligence service for the wealth management community, with the latest news, analysis and in-depth features from around the globe. *WealthBriefing* subscribers are part of an international community for whom staying abreast of the latest industry developments is a crucial part of their professional practice. Readers find our content on topics such as strategy, M&A, important people moves, investment management and asset allocation to be an essential resource in a fast-moving world.

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## WealthBriefingAsia

*Global Perspective, Regional Focus*

The Asia-Pacific region's meteoric rise as a major wealth management market has sparked huge demand for region-specific business information. *WealthBriefingAsia* was launched in 2009 to satisfy this growing information requirement, and it is the only wealth management news site focusing exclusively on the Asia-Pacific region. Providing indispensable news, features and industry views that are always relevant and concise, *WealthBriefingAsia* allows subscribers to conserve that most precious of all resources: time.

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## FamilyWealthReport

*North American Family Office Intelligence*

The North American wealth management market is one of the largest and most diverse in the world, and is markedly different from those in Europe and the Asia-Pacific region. Multi and single family offices in particular are a well-entrenched, integral part of the private wealth management landscape. *Family Wealth Report* provides need to know business intelligence in a convenient and easy-to-read format – straight to subscribers' inboxes every day. Nowhere else will you find such high quality, in-depth and often exclusive content all in one place.



### WEALTH MANAGEMENT AND PRIVATE CLIENT EVENTS AND AWARDS SERIES

A unique thought-leadership platform, *WealthBriefing's* events foster intellectual debate on the challenges and opportunities facing the industry and are designed to be an optimal use of wealth managers' precious time and present an excellent networking opportunity.

*WealthBriefing* has added to its offering for the global private banking and wealth management communities by running thirteen annual awards programmes for the family office, private banking, wealth management and private client communities. The awards programmes are focused around three main category groupings: experts (individuals and teams); products and services for wealth managers and clients, and institutions of all sizes and types

### BESPOKE RESEARCH SERVICES

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

# A Commitment Mentality At ONE swiss bank

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

I believe the recipe for success is a blend of strategy and mindset. The first step in crafting an appropriate strategy is to understand the ever-changing environment in which you operate and to know exactly who you are. Secondly, you need to be determined to implement the necessary changes relentlessly and have the emotional intelligence to build a complementary team that is committed to the project.

*"I believe the recipe for success is a blend of strategy and mindset. The first step in crafting an appropriate strategy is to understand the ever-changing environment in which you operate and to know exactly who you are."*

*Secondly, you need to be determined to implement the necessary changes relentlessly and have the emotional intelligence to build a complementary team that is committed to the project."*

On top of that, you need to add a touch of agility to find solutions to overcome the obstacles you will encounter along the way. Finding the right balance is a constant struggle. You have to focus on every small victory to keep moving in the desired direction, no matter the pace.

## What have been the main obstacles you had to overcome and how did you do so to reach this level?

The closing of each M&A operation is in fact only the beginning of the journey. Indeed, implementing the new development strategy with the right

people and the right level of commitment remains the most difficult challenge. What we have achieved over the last seven years is demanding; you have to be relentless in implementing all the actions that will make the company's vision a reality. Over the years, we faced multiple headwinds: internal push-backs, market selloffs, pandemic, wars, bursting inflation, etc. We are fortunate to have an enthusiastic, experienced team that is determined to turn any challenge into an opportunity. We also had to convince every stakeholder: authorities, clients, employees, shareholders, etc.

## Can you sum up the philosophy that sums up your firm the best?

I would say "SINCERELY COMMITTED". Toward our clients, we are sincerely committed to fostering a relationship based on mutual respect and trust and to offer them the best financial solutions that meet their needs at fair conditions. Toward our employees, we are sincerely committed to offering them a fulfilling and empowering professional environment with a good work-life balance so they can achieve their full potential. Toward our suppliers, we are committed to doing business with them with the utmost respect and to maintaining a relationship of trust and dialogue.

## Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?

I am interested in every individual who is passionate about what he or she does and who continuously tries to improve and develop his or her skills in order to offer the best to the society at large.

They can be sportsmen and women, artists, entrepreneurs, politicians, writers, filmmakers, etc. whatever the field of activity. I try to fuel my own inspiration by listening, reading and observing, I take notes, pictures or screenshots to come back regularly to my desk with fresh insightful ideas that will serve our ability to progress.



**Grégoire Pennone**  
CEO  
**ONE swiss bank**



Piguet  
Galland &  
you.



Your private bank,  
**Creator of  
Serenity**

**Investing**

**Wealth  
solutions**

**Financing**





# Helping Clients Achieve Peace Of Mind At Piguët Gallard



**Olivier Calloud**  
CEO  
**Piguët Gallard**

**W**e 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.

*"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.

**What does success look like to 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 is important to look beyond these numbers and focus on other aspects that tell us more about the quality of the growth we have achieved. Here we are looking at things like customer 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.





# Tools & Analytics for Advisory

*Sophisticated **front office digitalization** tools that deliver value to clients across channels and reduce cost-to-serve.*

How do you increase the profitability of the investment services when the regulatory landscape is shifting, competition increasing, budgets shrinking and clients demand even more sophisticated and innovative services for less?

**PFTPro Wealth Management Suite** delivers sophisticated, personalized, compliant and ongoing services through each client's preferred channels, exploiting all possible opportunities for automation.

# Relentless Focus On Innovation At Prometeia



**Carmine Cammarota**  
Country Head Switzerland  
**Prometeia**



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

Putting our clients and their needs at the centre of everything we do and driving the future landscape of the wealth management industry with cutting-edge solutions is what makes Prometeia proud and successful. Close and long-term relationships with our clients allow us to understand the market needs and how best to meet them. Our relentless focus on innovation fuels our success and ensures our clients stand out among their peers with top-notch solutions.

***"Putting our clients and their needs at the centre of everything we do and driving the future landscape of the wealth management industry with cutting-edge solutions is what makes Prometeia proud and successful."***

We've been building advanced front office solutions, and providing market data and analytics data feeds, for decades now. More than 100 financial institutions take advantage of our modular, compliant with regulations, sophisticated tools, leveraging them to serve their clients better and more efficiently, supporting the management of more than SFr2.5 trillion in assets.

## **What are the main contributions do you think you bring to the wealth management industry?**

By focusing on innovation and investing heavily in research and development we continue to shape the future of the wealth management industry.

New state-of-the-art modules, analytics, data feeds, innovative user experiences, accompanied by exciting ESG, AI, Mixed Reality Wealth Management and Cloud components ensure our clients can perfectly adapt and capitalize in a changing market environment.

Developing creative solutions through cutting-edge methodologies and technology to anticipate market trends allows us to maintain a competitive edge over our competitors and continues to drive our business for this year and the future.

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

Prometeia's recognition for the second year in a row by *WealthBriefing* highlights the quality of our service, the continuous efforts and commitments of our team and reinforces our main goal of consistently offering the best service for our client's needs. 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 a best-in-class service. 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.

## **Where in the world do you operate – are you mainly a domestic player or international?**

Prometeia has become the long-term partner of choice for financial institutions across Europe and the Middle East. Headquartered in Italy with offices in Zurich, Istanbul, London and Cairo we serve over 500 clients across 20+ countries. Our expanding global footprint is driven by our growing ambition and the success of our solutions.

## **What does success look like for you – can this be measured in hard numbers, or in qualitative ways, or both?**

Our employees, our greatest asset, the collaboration with clients & partners and our determined focus on innovation are the keys to our success. It can be measured by the long-term relationships we develop with our clients over the years or the innovative solutions we bring to the market.



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

With 60,000 global subscribers, *WealthBriefing* is the world's largest subscription news and thought-leadership network for the wealth management sector

Register for a free trial  
[www.wealthbriefing.com](http://www.wealthbriefing.com)

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**FamilyWealthReport**  
*North American Family Office Intelligence*

**WealthBriefingAsia**  
*Global Perspective, Regional Focus*

# Entrepreneurial Spirit Holds At REYL Intesa Sanpaolo



**François Reyl**  
Chief Executive Officer and Partner  
**REYL Intesa Sanpaolo**



**R**EYL's success is the result of our focus on innovation and customer service. Despite the significant growth and development of our business, we have never lost sight of what makes us unique - our entrepreneurial team spirit, and commitment to meeting our clients' objectives.

These guiding principles have been at the centre of all that we have done since our inception in 1973 and is the key reason why talented individuals work with us, and clients choose to partner with us.

We will continue to pursue the same strategy in the years to come to ensure we meet the needs of all our clients: entrepreneurs, family offices and institutional investors, by relying on the expertise of our wealth management, entrepreneur and family office services, corporate finance, asset services and asset management business lines.

## **What are the main contributions do you think you bring to the wealth management industry?**

Firstly, REYL contributes a dedication to continuous innovation.

The bank has evolved from a Swiss private bank into a diversified banking group, most recently completing the merger between REYL Intesa Sanpaolo and Intesa Sanpaolo Private Bank Morval in February 2022, as part of the strategic alliance with Fideuram - Intesa Sanpaolo Private Banking.

The bank now employs around 400 people and has assets under administration exceeding SFr26 billion.

As the bank has expanded and innovated, it has sought to further strengthen its team with some senior and strategic appointments during the last year including:

- Nicolas Besson, Chief Investment Officer, REYL Intesa Sanpaolo;
- Jon Duncan, Chief Impact Officer, REYL Intesa Sanpaolo; and
- Roger Groebli, CEO, REYL Overseas.

During the year, REYL has also continued to support Alpiant, Switzerland's first digital private bank. REYL's belief that digitalisation would play a crucial role in the future of the industry resulted in our engagement with and incubation of Alpiant and we are delighted that it gained its FINMA banking license and further funding during 2022.

The other major contribution that we bring to this industry is our commitment to sustainability, through supporting local communities and wider society.

Examples of our many initiatives include:

- REYL Group is one of the first financial partners of MSFeCARE, an innovative digital diagnostics initiative with a global impact, run by Médecins Sans Frontières (MSF - Doctors Without Borders) Suisse in Geneva.
- In Autumn 2022 REYL Group launched FORWARD, a report commissioned for its first edition to explore how the world of global education has evolved during the pandemic.

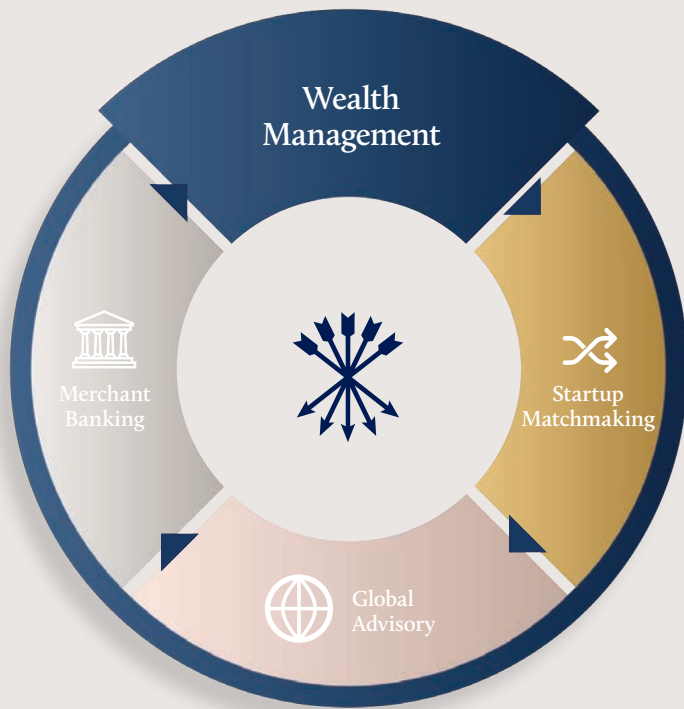
## **Where in the world do you operate - are you mainly a domestic player or international?**

REYL Group was founded in Geneva in 1973; it has expanded overseas, with offices in the UK, Malta, Dubai and Singapore.

REYL Overseas also advises US clients on international investment diversification, as a means to enhance portfolio returns.

# Start up to new heights

Connecting smart capital with innovative ideas



## The Startup Matchmaking Lifecycle

Three pillars to accompany you along your journey

### Wealth Management

A holistic offering with independent advice and personalized solutions for entrepreneurially-minded clients at all stages of the lifecycle

### Global Advisory

The world's most active M&A advisory platform with global reach and targeted expertise for companies on the path to IPO or trade sale

### Merchant Banking

Private Equity and Private Debt strategies shaped by the Rothschild family's investing tradition into luxury real estate, global technology and sustainable investments



## Find out more



The Swiss startup landscape is ripe with ground-breaking ideas and disruptive technologies that need just the right push to take off. On the other side are entrepreneurs and private investors looking for high potential businesses in which to invest. In the middle stands Rothschild & Co, connecting both.

Thanks to our longstanding relationships with entrepreneurial families, experienced private investors and our partnership with Venturelab, our network is the right booster for your Series A+ scale-up business.

# A Powerful Brand And Personalised Service



**Heinz Neshold**  
Head of Private Banking, Zurich  
**Rothschild & Co Bank AG**



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

It's a combination of various factors. First, we have a very strong brand and excellent reputation worldwide. Secondly, we offer an extremely personalised service to our clients, with our client advisors looking after only 20 clients on average. And thirdly, we give our clients access to exclusive investment opportunities and an unparalleled global network of investment and M&A experts.

**Can you sum up the philosophy that describes your firm the best?**

Rothschild & Co is in the hands of the seventh generation of the family today. Independent advice, an entrepreneur's view, and a long-term perspective are deeply rooted in our DNA. What also sets us apart from many competitors is the high proportion of their assets under discretionary mandates with Rothschild & Co, which demonstrates the confidence they have in us. Many clients particularly value our distinctive investment approach, including the opportunity to access to private markets and exclusive venture capital deal flows in Switzerland through our start-up matchmaking team.

**What does success look like you – can this be measured in hard numbers, or in qualitative ways, or both?**

It's always a combination of both, numbers, and qualitative aspects. A very good indicator for the latter is the feedback we get from our clients. I can mention two specific situations where this was especially important: During the pandemic our clients really appreciated that as a trusted and reliable partner, we were able to reassure them at a difficult time. Another example was that when markets were falling, close relationships with our clients were invaluable as we could demonstrate our added value to them [through the relative performance of portfolios].

We have been able to attract net new money for the past 11 financial years and increase the number of senior client advisors by 60 per cent in the past five years.

*"I really like the fact that I get to know many inspiring and successful people through my work. At the end of the day, everything we do is based on mutual trust and we work alongside clients, sitting on the same side of table as them, with their interests always at the heart of everything we do."*

**What do you most like about the wealth management industry, and what do you like the least and would most like to change?**

I really like the fact that I get to know many inspiring and successful people through my work. At the end of the day, everything we do is based on mutual trust and we work alongside clients, sitting on the same side of table as them, with their interests always at the heart of everything we do. Of course, increasing legal and compliance requirements complicate our work and make it more onerous, but they are obviously necessary. We are gradually deploying digital solutions to enhance efficiency and transparency in this area.

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

Such a renowned, independent award voted for by our peers, is the reward for a great deal of hard work by an excellent team.

**Schellenberg  
Wittmer**



**Building on  
what is  
already great.**

We are delighted to announce the strengthening of our team with the renowned expertise of our new Partner: **Guillaume Grisel** joins our Private Wealth team in Geneva.





# No Compromise On Technical Excellence



**Guillaume Grisel**  
Partner  
**Schellenberg Wittmer**

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

There is a long tradition at Schellenberg Wittmer of cultivating the qualities that make for success in this difficult and highly competitive field. Firstly, no concessions in terms of technical excellence. Secondly, the team members all have an international outlook and background. This allows us to take on very complex international files. Thirdly, we place great emphasis on client experience.

Bernard Vischer, who led the Private Wealth Practice Group for years, is a highly respected figure. Everyone knows David Wislon, who just succeeded him. Andrea Dorjee-Good, who runs the Zurich team, is highly regarded too, in particular in high-profile litigation. All of this has enabled Schellenberg Wittmer to achieve its leading position. I joined this great team because I value these qualities and share these values.

## **What are the main contributions do you think you bring to the wealth management industry?**

David Wilson has been advocating for the introduction of the trust into Swiss law for many years and did much to ensure that the recent regulation of trustees takes into account the interests of the industry.

As partners in the Practice Group, we freely give a lot of our time to the professional education of the trust industry in Switzerland. David was Chairman of STEP Geneva and I was Chairman of STEP Lausanne for several years (this is how our fruitful collaboration began!) As Vice-Chairman of the Swiss and Liechtenstein STEP Federation, I have been involved in the organisation of the STEP Alpine Conference from the beginning, in 2017.

Andrea, David and I make great efforts in legal research to stay on top of technical developments, and we write articles and

give lectures to share our knowledge and experience with the industry. In addition to that, I spent 3 years writing the only comprehensive legal and tax textbook on trusts in Switzerland (*Le Trust en Suisse, Schulthess, 2020*). This book seems to contribute to a better understanding of the trust by practitioners in Switzerland.

## **Where in the world do you operate – are you mainly a domestic player or international?**

Our teams provide legal and tax advice from Geneva, Zurich and Singapore, but our clients come from all over the world, which is very rewarding. We have the ability to reach remote markets through our regional desks in Latin America, the Middle East, Africa and Asia.

## **What do you most like about the wealth management industry, and what do you like the least and would most like to change?**

What we like most is probably the technical complexity. It inspires us and stimulates us. It does not frighten us because we know that we have the necessary expertise, motivation and dedication. The more complex a case is, the more chance we have to make a difference to our competitors.

***"What we like most is probably the technical complexity. It inspires us and stimulates us. It does not frighten us because we know that we have the necessary expertise, motivation and dedication. The more complex a case is, the more chance we have to make a difference to our competitors."***

As to the part we don't like, we are concerned about the constant increase in regulation. This tends to asphyxiate the industry.





**SOCIETE GENERALE IN SWITZERLAND**  
**A COMMITMENT FOR MORE THAN 125 YEARS**

From Geneva and Zurich, our private bankers offer  
bespoke wealth management and financing solutions.  
We thank our clients for their trust.

*Outstanding Private Bank –  
Switzerland – Domestic Clientele*

**2022 Winner**



PRIVATE BANKING & WEALTH MANAGEMENT  
SWITZERLAND CONFERENCE & AWARDS 2022



**WINNER**  
ESG

**WINNER**  
Credit Provider

**Societe Generale Private Banking Switzerland**

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 **SOCIETE GENERALE**  
Private Banking

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# Committed To Our Clients And The World Around Us



**Franck Bonin**  
Chief Executive Officer  
**Societe Generale Private  
Banking Switzerland**

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

Societe Generale Private Banking Switzerland acts as a gateway to diversified investment and financing solutions across the world for its clients. Via a holistic approach, we help them finance, structure, and optimise their assets.

Our international teams, booking centres and representative offices give us a unique multinational investment perspective and allow us to seamlessly mobilise multi-jurisdictional expertise and offerings. By leveraging these cross-border synergies, we have designed solutions tailored to each country where our clients are domiciled, allowing them to benefit from local market expertise and regionally optimised solutions.

We also support the investment projects of our clients via bespoke hedged and optimised international financing solutions based on innovative mechanisms.

Finally, our close connection with Societe Generale Corporate and Investment Banking allows for the co-construction of solutions perfectly aligned with the needs of our entrepreneurial clients to support them in managing their personal and professional assets.

## **What are the main contributions do you think you bring to the wealth management industry?**

I am convinced that Societe Generale Private Banking Switzerland has brought many contributions to the wealth management industry over the years. However, if only one were to be remembered, I really hope it would be the bank's strong commitment to the positive changes in the world.

For us, sustainability is a genuine pledge expressed both in our offering and governance. We have developed a comprehensive open-architecture ESG fund range and a proprietary ESG rating

system for external funds. In terms of governance, Societe Generale Private Banking has recently created its own Responsible Committee and a Voting and Shareholder Engagement/Stewardship Committee to positively influence the strategic decisions of the companies we invest in.

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

They testify to the relevance of our strategy and the quality of our product and service offering in a highly competitive Swiss market. Therefore, they give our bank greater visibility and, in so doing, positively contribute to the growth of our business.

***"For us, sustainability is a genuine pledge expressed both in our offering and governance."***

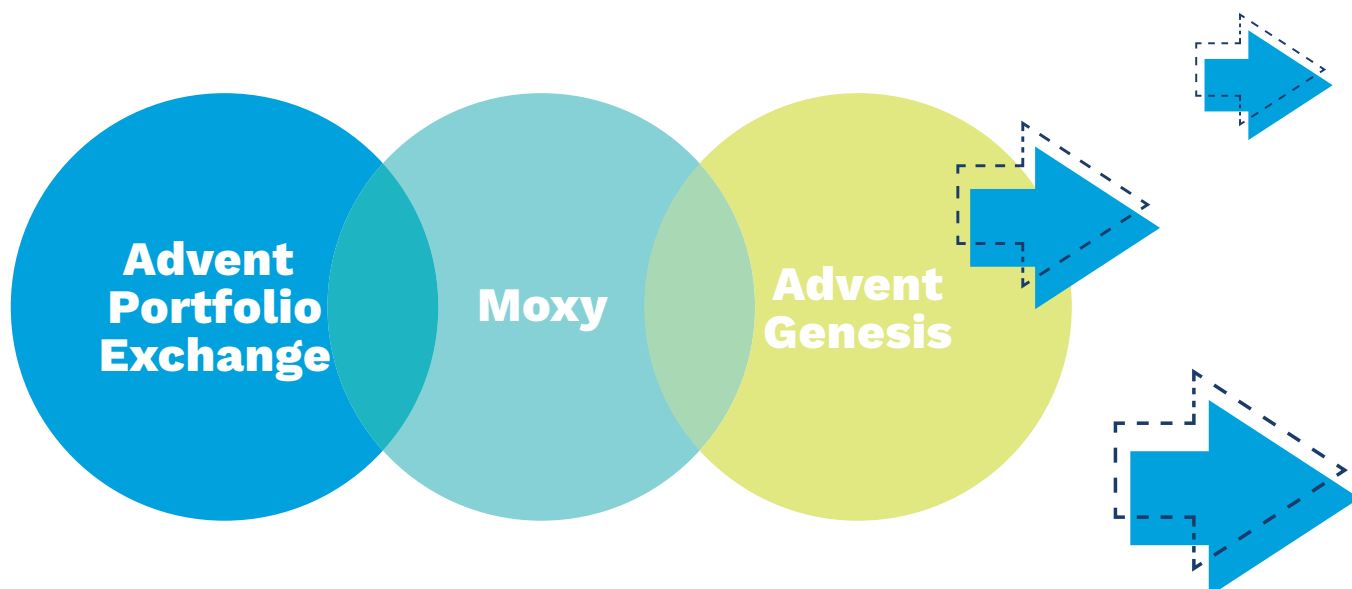
They are also a public recognition of the outstanding work performed by the teams of the Bank. As such, they are an incentive to always do better and strive for excellence.

## **Where in the world do you operate – are you mainly a domestic player or international?**

The Group is present in sixty-six countries, Societe Generale Private Banking in five, with representative offices outside these territories and a largely international client base. It is therefore tempting to conclude that Societe Generale Private Banking Switzerland is primarily an international player. However, the Group has been present in Switzerland for over 125 years, has a large domestic clientele, products tailored to local specificities and a strong attachment to the country.

Ultimately, I am firmly convinced that our clients get the best of both worlds, with the benefits of both an international and a domestic player.





# One platform. Three solutions. Unlimited possibilities.

**Transform your business with SS&C Advent's AMG suite – a single technology platform spanning the entire investment management process**

- **Advent Portfolio Exchange (APX): ensure everyone is on the same page**

Connect your entire enterprise – front, middle and back offices – and simplify operations, with this integrated portfolio and client management solution; a centralised, scalable platform for all your portfolio, relationship and prospect data.

- **Moxy®: sharpen your firm's competitive edge**

Streamline your investment management process and improve operational efficiency, with this seamless trade order management system covering the entire process – from portfolio modelling through to trade creation, execution, confirmation, allocation and settlement.

- **Advent Genesis: focus on where the revenue is generated**

Manage models, rebalance accounts, monitor portfolio drift and adjust strategies quickly and efficiently, with this comprehensive front office solution; expand into new markets, regions and lines of business with confidence.

**SS&C Advent's AMG suite. Already trusted by over 800 investment management firms worldwide.**



# Helping Clients Build World-Class Businesses At SS&C Advent

## What are the main contributions do you think you bring to the wealth management industry?

Our solutions and services enable our clients to build world class organisations. We also pride ourselves on having a highly skilled team that can assist and advise as needed. It is also important to us to have strong representation in all of our regions.

*"Recognition from well-established and respected publications are validation of our approach and commitment to the market. It is invaluable to all of our key stakeholders, both internal and external, to see our solutions and services acknowledged by highly regarded independent observers."*

Understanding the local nuances is key to being successful. We continue to invest and innovate, to continually improve our clients' options and empower them to be successful. Our aim is to optimise our clients' potential and allow them to create thriving businesses. Only by focusing on the client and market needs can we match our own ambitions and standards.

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

Recognition from well-established and respected publications are validation of our approach and commitment to the market. It is invaluable to all of our key stakeholders, both internal and external, to see our solutions and services acknowledged by highly regarded independent observers.

Winning awards in the region reinforces our capabilities and demonstrates our

commitment to continued success for our customers.

## What have been the main obstacles you had to overcome and how did you do so to reach this level?

Our industry is evolving. Client needs, technology and services are constantly evolving and it is vital we continue to innovate in order to stay at the leading edge and remain a force in this industry.

With such diversity in local regulatory requirements, market practices, instrument types and client expectations, a key challenge is to ensure our products and services have the flexibility and specialisation to cope with all these different market demands.

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

## What does success look like to you – can this be measured in hard numbers, or in qualitative ways, or both?

To us, true success is in assisting in our client's success. Focusing on having strong, flourishing and happy clients will ensure the other metrics are met. As a long standing and market leading vendor we do have the requisite oversight on financial, and quality metrics, as these are core elements of a healthy business.

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

Our aim is to continue to grow and to be one of the leading vendors in the market. We strive to be seen as a respected and valued member of our clients' communities and to bring expertise, ideas, innovation and world class solutions to serve the market. We also aim to be an employer of choice wherever we have a presence.



**Marc Schwarz**  
Relationship and Business  
Development Director  
**SS&C Advent**



# NOW AND FOR FUTURE GENERATIONS

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Our vision is to be the pre-eminent independent adviser to the world's leading families and wealth creators. We help families manage and protect their wealth now and for future generations.

  [STONEHAGEFLEMING.COM](https://www.stonehagefleming.com)



NOW AND FOR FUTURE GENERATIONS

# A Deep Understanding Of Clients' Needs At Stonehage Fleming



**Jacqui Cheshire**  
Partner, Head of Family Office Switzerland  
**Stonehage Fleming**



*Highly Commended*

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

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

Our client-first philosophy is at the heart of everything we do. The firm's global scale combined with a local presence enables us to deal with the needs of the multi-jurisdictional families we work with. We have a deep understanding of the cultural, language, legal, tax and regulatory challenges our clients face and our scale allows us to provide our clients with an ever wider range of services.

**What have been the main obstacles you had to overcome and how did you do so to reach this level?**

The last few years have been challenging, there have been geo-political uncertainty, rising inflation, higher interest rates and recession. We have tackled this head on by prioritising communication and having honest conversations with families. The most important factor has been our resilience.

**What are the main contributions do you think you bring to the wealth management industry?**

I have always been a self-starter. I have a natural affinity with the commercial dynamics of building relationships and working with clients. Furthermore, I believe that you can only look after clients properly if you have an efficient working team in place.

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

It is important for us to be recognised for awards as it shows that our hard work is paying off. It gives us recognition and is a chance

for us to celebrate our success and share this good news with clients and employees.

**Where in the world do you operate – are you mainly a domestic player or international?**

Our clients often have multiple jurisdictional touch points so it is important for us to have an international focus with a local presence. This is an important element of my role as a key advisor to a number of high net worth international families.

**What does success look like - can you measure it in hard numbers or in qualitative ways or both?**

Being an international family office with complex affairs over several jurisdictions brings with it an almost endless amount of challenges to be solved.

**Whom do you look to for ideas and inspiration? What other business sectors do you follow for ideas?**

I am inspired by the colleagues around me at Stonehage Fleming as I believe what we have is a truly pioneering family office offering. I'm always amazed by the talented people I work with, internally as well as the clients I have exposure to.

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

A strong entrepreneurial spirit is a part of our DNA at Stonehage Fleming. We are constantly building out new parts of the business to better support our clients and we will continue to do so.

# Never Explore Alone

Harness the power of machine learning and artificial intelligence

TOGGLE AI analyses billions of data points to identify interesting patterns and actionable insights



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AWARDS





# TOGGLE AI Helps Professional Investors Level Up



**Jan Szilagy & Giuseppe Sette**  
Co-Founders  
**TOGGLE AI**



*"AI, and Generative AI especially, has become especially popular this year but this is something we have been working on for a long time. I think having TOGGLE become synonymous with Generative AI in investment research is definitely a qualitative goal."*

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

Szilagy: TOGGLE was founded to serve professional investors, by professional investors. Giuseppe and I had worked at some of the world's largest asset managers and we were most recently Co-CIOs at Lombard Odier.

Working at large firms, we had access to every imaginable piece of data but it became clear that simply having access to the data itself, did not produce Alpha. Even if you are looking at a few dozen securities, you still have to monitor thousands of different data points. You can set alerts but that in and of itself is an extremely time intensive exercise.

**What are the main contributions you think you bring to the wealth management industry?**

Szilagy: Wealth managers thrive when they have the time to connect with clients. Any solution to expand this capacity is going to be attractive. When a client asks how their portfolio could react to a bear market, or if they should sell their tech stocks because inflation is rising, that client is looking for their advisor for their knowledge.

**Where in the world do you operate - are you mainly a domestic player or international?**

Sette: We are international, not only working with partners all over the world but providing global coverage as well, whether

that be German stocks, Canadian ETFs, Chinese commodities or global indices. We've partnered with global players like Nasdaq, Fidelity and Interactive Brokers, as well as leading Japanese groups like Line Securities and MUFG and four of the top five brokerages in South Korea.

**What does success look like for you - can this be measured in hard numbers, or in qualitative ways, or both?**

Sette: I think it's both. AI, and Generative AI especially, has become especially popular this year but this is something we have been working on for a long time. I think having TOGGLE become synonymous with Generative AI in investment research is definitely a qualitative goal.

**Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?**

Szilagy: I started my career working for Stanley Druckenmiller and it was actually Stan who encouraged Giuseppe and I to spin out TOGGLE as its own company. Stan has been part of some of the most fascinating trades in history and has been an avid supporter of TOGGLE.

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

Szilagy: I think in five years if we're seen as the AI-driven Bloomberg for every investor, that wouldn't be a bad outcome!

**What do you most like about the wealth management industry, and what do you like the least and would most like to change?**

Sette: The wealth management industry is intensely competitive and incredibly dynamic so it requires your absolute best. The bar for success here is so much higher and yet if you can deliver value not only will your clients stay with you but you can develop an incredible referral network.

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TRUST IN MOTION

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# Flexibility And Expertise Wins For TRUSTCONSULT



**Cécile Civiale Vuillier**  
CEO  
**TRUSTCONSULT (SUISSE) S.A.**



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

Our flexibility, our independence and the competence of our experts in the field make TrustConsult a major player in our sector.

**What have been the main obstacles you had to overcome and how did you do so to reach this level?**

In order to face the evolution of the world in which we evolve and the complexity that this brings to our clients' situations, which are becoming more and more challenging, we can count on the worldwide extension of our network and our ability to collaborate with everyone thanks to our independence.

**What are the main contributions do you think you bring to the wealth management industry?**

We have been able to keep a boutique spirit thanks to dedicated, passionate and enthusiastic collaborators which brings a renewal to the world of wealth management.

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

For us and our work it is a real recognition to be awarded at these Awards, it brings us satisfaction and a strong visibility in the sector in which we evolve.

**What do you most like about the wealth management industry, and what do you like the least and would most like to change?**

I most like the diversification, we do not have two clients with the same situation therefore our job is very varied. I least like the tendency around us for people to adopt the "political correct" attitude and therefore, place clients away from priority. We must

give again confidentiality to our client to offer them real protection, especially now that CRS etc. are alive and well executed.

**Where in the world do you operate – are you mainly a domestic player or international?**

Although we are a boutique, we are international players with customers in Switzerland, Europe, the Middle East, Africa, Asia and Latin America.

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

In our industry, numbers are important, but more importantly, we noticed that 2022 was a big year for us and we also realised that most of our new business came from referrals from existing customers.

**Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?**

Often we follow our instinct, we managed to create close relationships with people and we are fully dedicated to our clients. We have many brilliant personalities internally.

**Can you sum up the philosophy that sums up your firm/ you the best?**

Trustconsult (Suisse) SA is an independent Trust Company in Geneva, Switzerland, designed for entrepreneurs and wealthy individuals along with their families who originate from any part of the globe, offering a bespoke wealth service underpinned by trusted advisors and world class expertise. Our philosophy is to operate ethically and with integrity. This includes treating our clients with respect, honesty and transparency. A client centric culture focused on personalised service and collaboration through listening and problem solving.

# TrustQuay

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**TrustQuay** 

**Private Client and Trust Administration**

**Corporate Services**

**Alternative Fund Administration**

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# A Rich And Scalable Platform From TrustQuay



**Keith Hale**  
Executive Chairman  
TrustQuay

**T**rustQuay is a global leader in technology for the corporate services, trust and alternative fund administration industry, offering a functionally rich, scalable and secure front to back-office platform.

We help corporate services, trust and alternative fund administrators to reimagine their processes no matter where they are on their digitalisation pathway. We work with providers to help them consolidate data and systems onto a single digital platform, reduce regulatory burden, increase efficiencies and reduce costs through automation, and differentiate themselves in the market offering digital engagement with their customers. Serving more than 360 customers with 26,000 users in over 30 jurisdictions, TrustQuay has 11 offices around the world, including Jersey, Guernsey, UK, Luxembourg, Singapore and Australia.

## **What are the main contributions do you think you bring to the wealth management industry?**

TrustQuay's proposition is to enable digitalisation of the trust administration, corporate and fund services market (as part of the wider wealth management industry) via modern, scalable, and secure technology. We think we have made good progress particularly over the last 3 years, with more than 50 new customers implementing our software, but recognise that there is plenty more for the industry and us to do. For example, in April this year we launched TrustQuay Online, a game-changing new software offering which is the first complete end-to-end cloud-native SaaS platform for corporate services and trust administration providers.

TrustQuay Online is a fully digital entity management, client accounting, general ledger and practice management SaaS platform, enabling providers to meet their corporate and private wealth clients' regulatory requirements as well as manage their own business in a simple to use, highly automated way at a significantly reduced total cost of ownership. In October, we incorporated a new fund administration product as part of TrustQuay Online, offering fund service providers a frictionless

end-to-end solution from on-boarding to lifecycle management.

## **What does success look like for you – can this be measured in hard numbers, or in qualitative ways, or both?**

We measure our success both qualitatively and quantitatively. TrustQuay's vision is to become the technology provider of choice, both globally and in every market in which we operate. Our mission is to help our customers to leverage the power of technology to maximise efficiencies, reduce costs, ensure compliance and drive new revenue opportunities. In terms of numbers, following investment across our sales, account management and customer relationship functions, in 2021 (our most recent reporting period) recurring revenue sales were 160% higher than the prior year including 18 new logo signings. In 2021, TrustQuay successfully delivered 38 project go-lives, including 10 new implementations, 13 new modules, 3 new sites, 5 migrations and 7 upgrades.

## **Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?**

We get a lot of ideas and inspiration from other sectors of financial services and adapt these to the needs of corporate, trust and fund services providers. Onboarding is a good example – we live in an age where challenger banks are now able to prove identity, check addresses and meet KYC and AML requirements in minutes, however this was not happening or possible in our sector.

Working with best of breed ecosystem partners such as RiskScreen and GB Group, TrustQuay developed and launched the first fully automated and integrated onboarding solution specifically designed and developed for the corporate services and trust administration market, which also includes built-in ID verification. From smartphone ID scan, through to document examination, live face check selfie versus ID document, address checking using APIs to access credit reference agencies and other databases, and risk-based sanctions screening, this new solution provides a full audit trail that meets all KYC and AML obligations.



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 the UHNW Team (Swiss Domestic Clients) recognition at the WealthBriefing Swiss Awards 2023.



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UNION BANCAIRE PRIVÉE

# A Tight Alignment Of Interests Holds Key For Union Bancaire Privée



**Nicolas de Picciotto**  
Market Head Switzerland & Western Europe  
**Union Bancaire Privée**



**U**BP is one of Switzerland's leading private banks with over SFr140 billion worth of assets under management as at 31 December 2022. It ranks among the best-capitalised banks with a tier 1 ratio of 26.7 per cent and a long-term deposit rating from Moody's of Aa2 with a stable outlook.

## What are the main contributions you think you bring to the wealth management industry?

In its fifty-year history, not only has UBP maintained its independence, it has also achieved remarkable growth. Beyond the investment expertise and flexible integrated model that make us an ideal banking partner, clients can rely on UBP to remain by their side for the long term.

Being a family-owned bank, we can guarantee that our clients benefit from an alignment of vision and uncompromising management. UBP remains headquartered in Geneva but spans the globe. Spread over twenty locations in the world's key economic and financial hubs, the bank's 2,000 employees embody multiple nationalities and cultures.

## Can you sum up the philosophy that defines your firm the best?

UBP's vision from the outset has been to offer investors with an entrepreneurial mindset, a high-quality, innovative wealth and asset management service based on a fully integrated business model. A personal wealth journey is guided by individual requirements. We recognise our clients as sophisticated investors, and have built up the expertise to analyse every request, to identify our clients' needs, and to source or even create the best solutions for each of them. Risk management is part of our DNA and capital preservation is our primary goal.

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

Thanks to UBP's size and structure, we make decisions quickly and are very flexible in developing truly tailored solutions, seizing investment opportunities when they arise in the markets. Three key strengths make UBP stand out when addressing our clients' needs:

- 1) Innovative and expert investment management – our financial expertise is proven. Our pioneering convictions have made us a reference in the field of alternative investments and sophisticated financial products, while our asset management services enable our private clients to access products and services that are generally only made available to institutional investors;
- 2) Outstanding wealth planning expertise – our approach is holistic, taking into consideration our clients' global wealth, within UBP and outside, as well as other constraints and requirements. Having wealth planners dedicated to Swiss clients or clients looking to move to Switzerland is essential; and
- 3) Unique credit structuring capabilities – credit structuring is a highly valuable service for high net worth and ultra-HNW clients. UBP stands out by offering a wide range of credit solutions, including mortgages in Switzerland and abroad.

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

Today, UBP stands among the leaders in the field of wealth management in Switzerland and is among the top four non-listed family-owned private banks in the world. Over the coming years we will continue to expand both in our home market and abroad, consistently stepping up our wealth management activities with additional talent and reinforcing our asset management capabilities with new investment solutions.

# wize

BY TW

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Solution

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ADMIN & BACK-OFFICE - COMPLIANCE - REPORTING

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 TEAMWORK



# Great Support That Makes A Business Stronger

**W**IZE 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: Prometeia**



**WINNER: Rawlinson & Hunter (Switzerland) AG**



**WINNER: REYL Intesa Sanpaolo**



**WINNER: Rothschild & Co Bank AG**



**WINNER: Societe Generale Private Banking Switzerland**



**WINNER: SS&C Advent**



**HIGHLY COMMENDED: Stonehage Fleming**





**WINNER: Joanne Morse - Summit International**



**WINNER: TOGGLE AI**



**WINNER: Schellenberg Wittmer**



**WINNER: TRUSTCONSULT (SUISSE)**



**WINNER: TrustQuay**



**WINNER: Wealth Dynamix**



**WINNER: Wecan Group**



**WINNER: WIZE by TeamWork**



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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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# The Tenth Annual WealthBriefing Swiss Awards Winners 2023

## INVESTMENT MANAGEMENT CATEGORIES

*Digital Assets  
Solution*

WINNER



*Private Market  
Investment Specialist*

WINNER



*Fund Manager*

WINNER



*Alternative Fund  
Manager*

WINNER

ITERAM

*Structured Product  
Provider*

WINNER



*FX Solution Provider*

WINNER



*Fixed-Income  
Investment Strategy*

WINNER



*Private Investment  
Office/Multi-Family Office*

WINNER

Bedrock

*Private Investment  
Office/Multi-Family Office*

COMMENDED



## MARKETING/PR CATEGORIES

*Use of Social Media*

WINNER



*Marketing Campaign  
or Team*

WINNER



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**EXPERTISE** Liontrust's teams have long track records in managing UK equity, sustainable investment and liquid long/short funds

**PROCESS** Each fund management team applies distinct and rigorous investment processes to managing portfolios

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FOR WILDLIFE

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## WEALTH MANAGEMENT TECHNOLOGY CATEGORIES (VENDORS)

Front Office Solution

WINNER



Transaction Processing Solution

WINNER



Portfolio Management Solution

WINNER



Client Reporting Solution

WINNER



Compliance Solution

WINNER



Client Communications Solution

WINNER



CRM System

WINNER



Data Provider

WINNER



Risk Profiling Solution

WINNER



Risk Management Solution

WINNER



Onboarding Solution

WINNER



Most Innovative Client Solution

WINNER



Implementation of a Technology Solution

WINNER



Most Innovative FinTech Solution

WINNER



Client Accounting System

WINNER



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- ✓ ESG Risk Intelligence
- ✓ Periodic Refresh
- ✓ Perpetual KYC (Continuous Monitoring)
- ✓ Robo Onboarding
- ✓ Batch Remediation
- ✓ Lead Generation & Target Profiling

smartKYC is built to provide a 360° view of your client. Its intelligent automation provides a platform for private banks and wealth managers to empower front-of-house teams to be an efficient and effective first-line of KYC defense and focus compliance teams where it really matters.

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smartKYC proudly sponsors  
this awards ceremony and  
we congratulate all the winners!

smartKYC 



## PRIVATE CLIENT CATEGORIES

Legal Team

WINNER



**Schellenberg  
Wittmer**

Boutique Firm

WINNER



**Geneva  
Management  
Group**

Swiss Precision. Global Solutions.

Tax/Accountancy  
Team

WINNER



**RAWLINSON  
& HUNTER**

Independent Trust or  
Fiduciary Company

WINNER



**ACCURO**  
Trust and Private Office

Institutional Trust or  
Fiduciary Company

WINNER



**LEO TRUST**  
ZURICH SINCE 1980

Estate Planning  
Advice

WINNER



**TRUSTCONSULT GROUP**  
TRUST IN MOTION

Management  
Consultancy

WINNER



**BearingPoint®**

## WEALTH MANAGEMENT TECHNOLOGY CATEGORIES (IN-HOUSE SOLUTIONS)

Client Reporting

WINNER



17 96  
**LOMBARD ODIER**  
LOMBARD ODIER DARIER HENTSCH

Most Innovative  
Client Solution

WINNER



**Geneva  
Management  
Group**

Swiss Precision. Global Solutions.

## PRIVATE BANKING CATEGORIES

**Corporate Strategy  
Implementation**

WINNER

**Investment  
Management Platform**

WINNER

**Family Office  
Offering**

WINNER

**EDMOND  
DE ROTHSCHILD****Specialist  
International Team**

WINNER

**Client Initiative**

WINNER

**Client Service**

WINNER

**Credit Provider**

WINNER

**Customer Facing  
Digital Capabilities**

WINNER

**HNW Team  
(Swiss Domestic Clients)**

WINNER

Piguet  
Galland &  
vous.**HNW Team  
(International Clients)**

WINNER

**UHNW Team  
(Swiss Domestic Clients)**

WINNER



UNION BANCAIRE PRIVÉE

**UHNW Team  
(International Clients)**

WINNER

**Private Bank  
Operations Team**

WINNER

**Domestic Private  
Bank**

WINNER

**Foreign Private Bank**

WINNER



**PRIVATE BANKING CATEGORIES** *(continued)*

**Private Bank  
Leadership Team**

**WINNER**



**Most Promising  
New Entrant**

**WINNER**



**Wealth Management  
Executive Search Firm**

**WINNER**



**Wealth Planning  
Team**

**WINNER**



**Impact Investing**

**WINNER**



**Corporate Social  
Responsibility/  
Diversity Programme**

**WINNER**



**ESG**

**WINNER**



**EXTERNAL ASSET MANAGER (EAM) CUSTODIAN CATEGORY**

**Overall Platform for  
External Asset Managers**

**WINNER**



## LEADERSHIP CATEGORIES

**Wealth Management Rising Star  
Under 40**

WINNER

GEORGIOS LEONTARIS

**Women in Wealth Management  
(Individual Contribution)**

WINNER

JOANNE MORSE

**Women in Wealth Management  
(Company Contribution)**

WINNER

**Leading Individual**

WINNER

PIERRE GABRIS



# GLOBAL AWARDS

Showcasing The Best in the Industry

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

## 2023 Announcements Schedule

### FEBRUARY 2023

WealthBriefing Swiss Awards  
WealthBriefing WealthTech Americas Awards

### MARCH 2023

WealthBriefing Swiss EAM Awards  
WealthBriefing European Awards

### MAY 2023

Family Wealth Report Awards

### JUNE 2023

WealthBriefingAsia Greater China Awards  
WealthBriefingAsia Awards

### JULY 2023

WealthBriefing Wealth For Good Awards

### OCTOBER 2023

WealthBriefingAsia EAM Awards

### NOVEMBER 2023

WealthBriefing MENA Awards

### DECEMBER 2023

WealthBriefing Channel Islands Awards



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