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EXCLUSIVE
WINNERS OF THE 2020
WEALTHBRIEFING
SWISS AWARDS



February 2020



ostrich.

/ˈɒstrɪtʃ/ noun (financial)

person or organisation failing to see or act upon the need for a sustainable growth strategy;
see also: *head in the sand.*

rethink everything.

17  96

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FOREWORD

Tom Burroughes, Group Editor, *WealthBriefing*

The *WealthBriefing* Swiss Awards honour the practitioners in the wealth management sector who have set high standards to push the sector forward in often challenging conditions. It is vital to celebrate the work that is done to serve clients well: such clients build companies and create jobs. Without a solid wealth sector to protect investors and their families, less economic growth, and all that this implies, comes through. That fact is not always appreciated.

This news service also knows that hosting these awards opens a big insight into the trends and ideas shaping the sector. Industry figures can observe what it takes to be successful in future. Awards keep people on their toes – a bit of awards envy has its benefits.

At the heart of the awards is the judging process. A panel of judges, drawn from senior figures in banking, law, technology, multi-family offices and trusts specialists, sift through a large number of applications to arrive at a shortlist and eventually, the winners. Judges bring their knowledge and experience to the task; it is important to remember that a large weighting is given to the calibre of an applicant's awards submission. Organisers will approach firms and people they think ought to put their names forward. A vital point is that judges are divided into groups so they don't look at entrants from their own sectors: a private banker cannot judge another one. This process is designed to avoid bias, conflicts of interest and possible access to confidential data. The list of judges is published on this news service's website. We review award categories regularly, and welcome feedback about them.

Wealth management is about its people and the brand reputation they help to build in themselves and their firms. We know these awards cement those achievements, and salute the hard work these involve.

This is a "people business" and these awards shine a bright light on the great people who make this industry what it is.

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OVERVIEW OF SWISS WEALTH MANAGEMENT SECTOR

Switzerland's prowess as a private banking and wealth management hub is so well known that it's easy to take it for granted. But industry figures know complacency is dangerous, and the country hasn't held its status as the single largest offshore centre, and important domestic onshore one, by accident. Bank secrecy may be an international dead letter these days, but a reputation for political stability and good climate service counts for a lot in a world with more than its fair share of geopolitical upheavals. Security, reliability and attention to detail count for a great deal with clients from Europe, the Middle East, Latin America, Africa and Asia, among others.

The Alpine state was home to \$2.3 trillion in personal wealth out of a total offshore sum

of \$8.2 trillion, according to Boston Consulting Group in 2018 – that figure is likely to have got larger after the 2019 stock market rally. Many of these clients are served by the big players such as UBS, Credit Suisse and Julius Baer, with other more "mid-sized" firms making a splash, such as Lombard Odier or Mirabaud. There's been restructuring and change: the total number of Switzerland-based banks has shrunk to about 250 from more than 300 a decade ago. Rising regulatory costs, changed client expectations and some tough margin conditions have produced industry consolidation. It is worth also remembering that some Swiss banks are also quite young, pitching for the kind of New Economy, hard-charging entre-

preneurs who are disrupting sectors such as tech and health.

And beyond the banking sector there's a busy asset management, insurance and fintech sector in Switzerland. So many of the technology firms that are the "plumbing" of modern finance are Swiss, such as EPAM and ERI Bancaire, to name just two. Switzerland has also seen action around the crypto-currencies and distributed ledger blockchain technology. Whatever one thinks of these areas, they are busy.

Switzerland is an example of age-old experience added to an ability to reinvent and change – the country's watch industry is an example. Wealth management is also an example of this. It continues to pack a punch.

A detailed, close-up photograph of an eagle's eye, showing the intricate texture of its feathers and the sharp focus of its iris. The eye is the central focus, with the pupil and iris clearly visible. The surrounding feathers are dark brown and have a fine, layered texture.

eagle.

/ˈiːɡ(ə)l/ noun (financial)
person or organisation with far-sighted
vision committed to sustainable
behaviours and growth strategies.

rethink everything.



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JUDGING PANEL

The 2020 *WealthBriefing* Swiss Awards programme was focused around three main category groupings: **experts** (individuals and teams), **products** and **services** for wealth managers and clients, and institutions of all sizes and types in the 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.



NICK BLAYDES
Associate Partner
EY



**CECILE CIVIALE
VUILLIER**
Head of Private Client
TrustConsult Group



ARNAUD LECLERCQ
Group Managing
Director
Lombard Odier



URS BOLT
Advisor
bolt.now



ETIENNE D'ARENBERG
Partner
Mirabaud



JUSTINE MARKOVITZ
Chairperson
Withers



NIELS BOM-OLESEN
CEO
HypoSwiss Banque
Privee



JAMES DAY
Managing Director
Peritus Investment
Consultancy



DANIEL MARTINEAU
Executive Chairman
Summit Trust
International



PHILIPPE BONGRAND
Independent Advisor



LAURENT GAGNEBIN
CEO
Rothschild & Co



ANDREW McCALLUM
Managing Director
Rhône Trustees
(Switzerland)



LUDOVIC BONNAMOUR
Managing Director
TCA Asset Management



**DR ARIEL SERGIO
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TOM BURROUGHES
Group Editor
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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 3 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.



DUNCAN MUNRO
Senior Vice President
Banco Santander



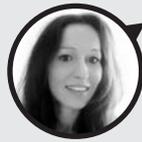
MATTHEW SPENCER
Head of Business
Development and
Marketing
Close Brothers Asset
Management



BRUCE WEATHERILL
Chief Executive
Weatherill Consulting



SHARMIL PATWA
Founder
Opus Una



WENDY SPIRES
Head of Research
ClearView Financial
Media



MIKE WELTI
Managing Director and
Head
REYL & Cie, Zurich



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



MIKE TOOLE
Chief Operating Officer
Artorius Wealth



**DAVID WALLACE
WILSON**
Partner
Schellenberg Wittmer



OSMOND PLUMMER
Managing Director
Wealthcoaching.ch



DR MARCEL TSCHANZ
Partner,
PricewaterhouseCoopers
Advisory Services
PwC



JURGEN PULM
Head of Private Banking
for CPB Services
RBS



GREGOIRE ULDRY
Partner
Charles Russell
Speechlys



RAY SOUDAH
Founding Partner and
Chairman
MilleniumAssociates



STEFANO VERI
Group Managing
Director, Global Head of
Financial Intermediaries
UBS Wealth
Management

AON'S QUALITY DATA PUTS A DENT IN THE WEALTH MANAGEMENT UNIVERSE

Tom Burroughes of *WealthBriefing's* talks to Tasha Vashisht, Global Head of Thought Leadership and Caroline Burkart, Associate Partner, of AON's Client Insight practice.

Could you provide a brief overview of your business in terms of what it does, size, location, recent news around it?

AON's Client Insight practice (formerly known as Scorpio Partnership) is a market leading research and consultancy business focused exclusively on the private banking and wealth management sector. We work with our clients to help them better understand and engage with high net worth and ultra-HNW individuals in order to deliver a superior client experience to their clients and ultimately help drive business growth.

We work globally, with teams based in London, New York and Singapore and have a 20-year track record in delivering impactful and actionable insights. In 2019 we launched and completed the first ever syndicated benchmark study for client experience for the UK wealth management industry. With 10 participating firms in its first year, the benchmark is a landmark moment for the industry. The 2020 initiative is underway.

What sets you apart from your peers this year?

The quality of the data we produce and our willingness to produce pioneering research for our clients. We pride ourselves on producing the very highest quality data and this is the bedrock of how we work. This is evidenced in our work with our clients, for example we are now in the sixth year of our Thought Leadership engagement with BNP Paribas Wealth Management.

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

By having the courage to challenge the status quo and produce pioneering work that stands out within the industry. For example, the UK Client Experience Benchmark for the wealth management industry and the continued work we do on behalf of BNP Paribas Wealth

Management with the Global Entrepreneur Thought Leadership Report.

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

Continue to demand and produce only the highest quality of data and insight with a laser focus on the end U/HNW client, and continue to evolve our research methodologies.

What have the challenges been in obtaining excellence?

Outstanding thought leadership in our sector requires a combination of creativity, commercial thinking, expert industry understanding, high-quality data, and robust risk mitigation processes. It can be time-consuming, labour intensive and expensive to make such a commitment to continually push the boundaries.

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

We draw influence from a wide sphere, be it market leaders in our own industry, or firms that really push the boundaries in industries unrelated to wealth.

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

We hope this elevates our visibility to both our clients, prospective clients and competitor firms, and in doing so cements our position as a leader in our field of client insight.

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

We'll advertise it through our social media channels, reference it in conversations with our clients and in all email communications. ■

"THE **QUALITY** OF THE DATA WE PRODUCE AND OUR WILLINGNESS TO PRODUCE **PIONEERING** RESEARCH FOR OUR CLIENTS. WE PRIDE OURSELVES ON PRODUCING THE VERY **HIGHEST** QUALITY DATA AND THIS IS THE BEDROCK OF HOW WE WORK."



REACHING EXCELLENCE BY INTERNATIONAL REACH, COLLABORATION AND CONTROL

Tom Burroughes Editor of *WealthBriefing* talks to **Laurence Mandrile Aguirre**, Managing Director, Citi Private Bank, about the firm's successes in this year's awards.

What explains how you managed to get to this award-winning level?

Clear segment focus: We have a clear strategy in Citi Private Bank. In Switzerland we are a mid-sized bank with presence in Geneva and Zurich. We have defined our market segment very clearly to focus on worldly and wealthy individuals and family offices; and we have been very focused on executing this strategy according to our vision. We are a global bank with footprint in 130 countries and we want to deliver our globality to our clients.

Another key differentiating factor is the fact that Citi Private Bank is part of our institutional client group. We have a strong collaborative approach with our colleagues in the corporate and investment banking, markets and transaction services to deliver institutional solutions to [sometimes] complex and international situations.

Portfolio risk analysis tools: Our Investment Lab has been a key differentiator in helping us deepen our relationships with the clients. Our proprietary analytical tool provides clients with information that supports their decision making. More recently, the Lab developed key tools using fintech and AI technologies to manage our data more efficiently and to deliver digital portfolio management solutions to the clients.

We have innovated and invested in technology: At Citi, innovation is part of our DNA. One of our most exciting initiatives that was rolled out recently was delivering digital solutions to clients like paperless on-boarding or real time portfolio statements.

Describe how your colleagues contributed to the success of your organisation as shown by the award?

I see three key attributes. One is our collaborative culture. There is a lot of emphasis on how we develop and deliver solutions to the clients as a team. We empower every single individual inside the organisation to come up with better ways to serve clients, suggests improvement points at all levels and in every department.

The second is our coverage model. We have a minimum number of clients dedicated per bankers and counsellors which allow us to be relevant to our clients; and allow us to invest the time and resources to help our clients achieve their goals. To bring insight and expertise to the clients, we also have a team of specialist that work with the banker team to deliver solutions to the clients.

And the third is the importance of our control functions and be on top of regulations, adjusting our processes along the way. Our colleagues play a key role in our success in keeping us compliant every day.

What obstacles and challenges did you overcome and take on to reach this point?

Use of resources: We had to make sure we deployed the right resources to service the client segments. This includes taking strategic decisions along the way. With the pace of technology and digital capability advancing rapidly, we also need to make sure that the budget allocated towards technology investments are the right ones that could be integrated to our workflow and network.

Who and what has inspired you to achieve this success and whom do you look to as a role model?

We have a very solid and stable management team at the top. This brings stability and a clear vision. When I think about our CEO for the Private Bank (Peter Charrington) or the EMEA region (Luigi Pigorini), our leaders are passionate about private banking. To them, and this trickles down to all of us, the client is at the center of what we do – we want to be the best for our clients – and this is very inspiring. Our aspiration is to become the best private bank for our clients.

Going forward, how will you continue to set award-winning standards?

We will not rest on our laurels. We will continue to monitor the competitive landscape, and constantly adjust our solutions and capabilities to an environment that is constantly evolving. We will need to be very attentive to our clients' needs and what they expect from us and adjust our value proposition and offering accordingly. We strive to be the client's first call! ■



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satisfied
with the
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WINSTON CHURCHILL



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ASSET MANAGEMENT
INDEPENDENT MANAGERS
PRIVATE MARKETS

A PERSONAL TOUCH WINS AND KEEPS CLIENTS – HOW SYZ CAPITAL SUCCEEDS

Marc Syz, Chief Executive of SYZ Capital talks to Tom Burroughes from *WealthBriefing* what qualities have impressed peers and clients alike.

What sets you apart from your peers this year?

As a genuine private bank, SYZ is by definition client-centric. Personal relationships are a priority and private bankers are always available to clients. Unlike bigger institutions that like to quantify relationships and establish complicated metrics to cut costs, our team prefers a more qualitative and personal approach. Mutual trust is achieved by ongoing contact and engagement.

The bank is growing its pool of clients and scope across regions, with expansion in Africa and Asia. The team has also won discretionary mandates for trust accounts, business from principals for both their corporate treasury as well as their personal accounts

SYZ Capital sets the Group's investment offering apart by combining strategic focus with an innovative edge. SYZ has always believed in the value of alternative investment strategies as a tool for greater portfolio diversification and risk-adjusted returns. At heart, the Syz family and SYZ Group are first and foremost entrepreneurs and investors. In this sense, they only offer clients access to investment strategies where they would be happy to be the lead investor.

Indeed, SYZ Capital ensures alignment of interests of all parties by being actively involved and invested alongside clients in every transaction. As a global investment group whose priority since inception in 1996 has been the generation of performance for clients, it recognises the potential, in terms of returns and diversification, of private market strategies in a portfolio.

While private markets, such as private equity, real estate and other illiquid assets have traditionally been the preserve of institutional investors or the largest ultra-high net worth individual, SYZ Capital's mission is to democratise access to these assets for most private clients. SYZ Capital is able to offer qualified private clients of all sizes access to private equity, debt and real estate opportunities starting from 100,000 Swiss francs. This can come in three forms: direct investments, thematic funds or multimanager products.

Alternative investments have been a core business for SYZ since its foundation, representing approximately SFr1 billion in advisory and discretionary mandates. In 2018, SYZ saw an increased interest in the OYSTER Alternative Uncorrelated fund. In May 2019, the strategy won the award "Fund of Hedge Funds – specialist" at the HFM European Performance Awards 2019 for its ability to deliver significant risk-adjusted performance in all market

conditions. The strategy attracted a Spanish private bank, which entrusted the team with an institutional mandate targeting €150 million, structured and managed as a UCITS alternative fund and intended for its advisory and discretionary mandates.

SYZ is continually sharpening its differentiated edge. It has forged partnerships on sustainability, including initiatives with the World Bank, which connect investors to the UN's Sustainable Development Goals (SDG). It has also launched an initiative to respond to increasing demand among institutional clients for environmental, social and governmental selection criteria, which are already applied to the choice of issuers in the SYZ fixed income range.

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

The group is also tapping into the world outside financial expertise. It recently created a pioneering Scientific Advisory Board to enhance the quality of its systematic investment strategies - leveraging insights from leading academics. The research focuses on developing cutting-edge algorithms to develop new systematic strategies and improve portfolio construction and rebalancing.

What have the challenges been in obtaining excellence?

SYZ creates investment solutions specific to each client's investment requirements. Clients want tailored advice, flexibility and balance between performance and risk. They appreciate SYZ's risk budget approach that aligns portfolio strategy with their requirements. The discretionary investment team defines the dynamic risk budget with each client, accounting for stock-level volatility and strategic asset class outlook.

This approach allows SYZ to tailor exposure to each asset class at the stock level, using its economic outlook to create value throughout the economic cycle. The result is an investment philosophy that defines a clear risk budget with a minimum and maximum authorised volatility level. Client portfolios are managed within these dynamic risk-bandwidths, helping them meet financial goals in accordance with their risk profile.

A key focus and challenge has been to protect recent strong performance by adding layers of downside protection. For example, in the current economic context of slowing growth momentum, deteriorating market sentiment linked to the trade war, as well as contained

inflationary pressures and accommodative monetary conditions, the discretionary team has recommended keeping a cautious stance. This means favouring uncorrelated assets (protections, gold, Japanese yen) and quality in equities, while maintaining some attractive risk/reward investments in the fixed income space (short-term EM bonds). Accordingly, the team has actively managed the portfolios by purchasing additional protection and reducing equity exposure.

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

We like to see ourselves as a mirror to our clients' aspirations. Like many of them, we at SYZ are natural-born entrepreneurs who take inspiration from the pioneers and innovators that are shaping the world.

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

We hope winning this award will help us engage with more clients across the globe and be an inspiration for others to follow our footsteps in innovation and pushing the boundaries.

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

We will leverage our editorial communications, marketing functions and social media platforms to raise awareness around this prestigious award. ■



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CAPITALIUM ADDS INVESTMENT VALUE AND KEEPS CLIENTS' LIVES SIMPLE

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

Capitalium Advisors won the category of **Asset Manager Serving Family Offices and Private Banks** in the *WealthBriefing Swiss 2020 Awards*. The firm develops solutions that are tailored for clients whether they are families, entrepreneurs or Millennials. The firm tries to simplify the financial lives of clients as far as possible. The organization is based in Geneva and is part of the CASA Group. The group advises Swiss and international clients on financial and non-financial aspects of asset management.

What sets you apart from your peers this year?

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

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

We maintain a start-up-like environment through a culture of innovation. We work on connecting each member of the team with our mission to transform the wealth management industry and to offer to our clients a unique financial experience. In order to achieve our goals, complementarity of skills and characters has proven crucial to develop the company. Diversity is a key factor.

In recent years, Capitalium has taken minorities stakes in Schoeb Frote, a wealth Management company based in Neuchatel and more recently in Finanzlab, a firm focusing on advice and brokerage of structured products, based in Lausanne. Synergies between companies in our filed are common, this combination allows us to offer our clients a more competitive proposition with the most integrated value chain possible.

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

To become an award-winner is not an objective, but rather the consequence of business practices that have been turned into a

successful business model. Or, at least, the testimony that you are doing something that is creating some value for your clients. Our vision remains intact and we intend to continue to invest every penny we earn to support our development and attract talented people who share our values and vision.

What have the challenges been in obtaining excellence?

The pursuit of excellence has somehow to connect with a high degree of enthusiasm. It requires a lot of efforts that must be balanced with positive energy in order to be sustainable in time. Besides, we are working every day to secure that our clients support the development strategy. Ultimately, excellence is a relative concept versus your peers, as well as an absolute criteria driving each decision we make.

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

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

As a consequence there is no chance to find any inspiration under these conditions. The wealth management sector has suffered from a lack of governance and entrepreneurship that created inertia. The divergence between outputs that would become commoditized and the one that will protect a high value proposition is getting bigger. We are in the game for the second option!

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

The more people can get to know about our business model and the new standards Capitalium and its partners Schoeb Frote and Finanzlab are raising, the better.

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

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

"THE PURSUIT OF EXCELLENCE HAS SOMEHOW TO CONNECT WITH A HIGH DEGREE OF ENTHUSIASM. IT REQUIRES A LOT OF EFFORTS THAT MUST BE BALANCED WITH POSITIVE ENERGY IN ORDER TO BE SUSTAINABLE IN TIME."



CHARLES RIVER'S GLOBAL PROWESS SHINES THROUGH

Tom Burroughes, Editor of *WealthBriefing*, talks to **Gavin Lavelle**, who is Managing Director for EMEA at Charles River, about why the firm has hit the heights in its sector.

What sets you apart from your peers this year?

Growth: Charles River's global talent pool grew rapidly, backed by significant investment from parent firm State Street. Our Wealth Management Solution represents the largest portion of our new business and we are actively engaged with several large wealth managers in a sales or implementation capacity.

Longevity: Charles River recently celebrated its 10th anniversary as a wealth solution provider; our clients include many of the largest wealth managers, private banks and sponsors in Europe and North America. Since 2009, Charles River's Wealth Management Solution has offered wealth managers streamlined capabilities that support discretionary and non-discretionary products, enhanced mobility across asset classes, and has helped attract and retain financial advisors. Today, the platform supports over 30 of the world's most prominent advisory firms, managed account program sponsors, and private banks.

Leadership: In 2019, we announced the formation of a client advisory board focused on wealth management. Members of the board will serve to provide expert insight and advice on the development and enhancement of the Charles River Wealth Management Solution.

Mobility: Our commitment to providing clients with a seamless digital experience was underscored by the launch of Charles River Everywhere, our latest tool designed to ensure anytime/anywhere access to portfolio and order management capabilities. In addition to supporting mobility for busy investment professionals, Charles River Everywhere enables private wealth advisors to offer a more personalised client experience and the opportunity to offer private wealth clients targeted advice.

Overlay: We have enhanced our overlay management capabilities to provide private wealth client advisors with a 360-degree view of client assets, a key requirement for banks offering tax-aware, household-level solutions.

Compliance: We incorporated new capabilities that help banks determine and document investment product suitability that are aligned with client risk preferences and enhanced KYC capabilities.

Connectivity: We continue to see growing adoption of the Charles River Wealth Hub, enabling asset managers to automate and streamline communication with platform sponsors. Managers access a single dashboard for all communications, where they can securely distribute account and model updates to all applicable sponsors in a single click.

Choice: The launch of our third-party provider ecosystem enables Charles River clients to extend the Charles River Wealth Management Solution by integrating their choice of externally-developed applications, analytics, and data on the platform.

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

Charles River's global engineering, product, and client management teams are key to our success. Working collaboratively across geographies and markets helps ensure that we continue to provide technological leadership and innovation to the global wealth management community.

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

We continue to lead the industry in R&D budget, investing over \$50 million annually across the Charles River product suite with \$10 million allocated to our wealth management solution. Staying constantly engaged with our clients is also critical. Rapidly changing incentives, business models and investor preferences require agility from our product and development team to help ensure our technology aligns with our client's needs, from regulatory compliance and mobility to scalability and performance.

What have the challenges been in obtaining excellence?

Finding and attracting talented technologists and other professionals in the current tight labor market is difficult. Our uncompromising standards aim to ensure that Charles River's global talent pool reflects a diverse mix of industry knowledge, technological expertise and commitment to client service.

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

Our global client base of top-tier firms inspire our product and engineering teams to provide the best technology and client experience possible. Client feedback and collaboration enables Charles River to continuously incorporate new innovations in our wealth management platform.

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

Our hope is that it underscores how committed Charles River is to working with wealth managers, private banks and sponsors globally to address the significant and disruptive changes impacting the industry.

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

This award adds to our growing collection of *WealthBriefing* awards we've won over the past three years and underscores the value that our clients place in our technology and commitment to service. ■



“CHARLES RIVER'S GLOBAL **ENGINEERING**, PRODUCT, AND CLIENT MANAGEMENT TEAMS ARE KEY TO OUR SUCCESS. WORKING COLLABORATIVELY ACROSS GEOGRAPHIES AND MARKETS HELPS ENSURE THAT WE CONTINUE TO PROVIDE **TECHNOLOGICAL** LEADERSHIP AND **INNOVATION** TO THE GLOBAL WEALTH MANAGEMENT COMMUNITY.”

ALIGNING VALUES WITH GREAT CONDUCT HITS THE MARK FOR DART

Sasha Savic, Partner and Chief Operating Officer at DART Talent and Executive Search, the executive search firm, talks to **Tom Burroughes** from *WealthBriefing* about the firm's successes to date.

What sets you apart from your peers this year?

Consequent focus on a selected and exclusive client base whose values on how they conduct their business are aligned with what we have set ourselves as guiding principles for DART and its culture. Only if we are as well fully convinced, we can represent our clients with the required credibility in front of senior talents in the markets.

Further to that, we value candidate experience across the entire search process as much as we value an impeccable client experience. We care about how well our clients do, we care about what type of institution we convince people to join, and what it will mean for their careers and fulfilment.

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

I could list many attributes such as hard work, commitment to excellence, team-work and full dedication to our clients and candidates. But what I really would like to highlight is how many times I could observe my colleagues when it gets crunchy and how they outgrow themselves to deliver what they have promised.

During times of seasonal rush or tight project deadlines, they just keep going with the right focus and high level of motivation. They acknowledge that success will require hard work and perhaps some sacrifices and yet they stay committed. As important is that we celebrate the success as they come and, believe me, they are very good at celebrating as well! Feel privileged to work with the DART team!

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

We are honoured to receive such a prestigious award and are very grateful for the

recognition. We will stay humble and continue on our path. We are and will constantly reflect after every meeting or project, what we do better and continue to learn from our experiences.

What have the challenges been in obtaining excellence?

I would not talk about "challenge" in the classical definition of the word. It is only a challenge if there is a lack of passion in what you are doing. As suggested above, each and everybody at DART has the passion to deliver excellence for our clients and candidates.

The appearing stumbling blocks or curve balls along the way are then easier to handle and to keep course.

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

We are privileged to come across so many inspiring leaders in the wealth management industry and beyond that it would be impossible to pick one or two names. As mentioned above, we are looking up to leaders and companies whose values are resonating with ours and we are trying to learn from them.

Every project itself and every interaction we have with our clients and candidates is an opportunity to become better and come closer to our role models in the business.

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

Reassurance that our chosen path is the right one for us and as well reassurance to our esteemed clients that they have chosen the right partner in the search for talents their need for developing their businesses. It will further strengthen our profile towards future potential

clients in the wealth and asset management industry and, equally important, as well in other fields where we are currently expanding, for example in the constantly evolving fintech industry.

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

When I have started my career 20 years ago, one of my first superiors used a German expression which I still like and use: It goes "tue Gutes und sprich darüber". Something like "do good and talk about it".

Now, let's be clear...it has nothing to do with bragging! We stay humble, we are grateful and we continue on our path - while we will proudly mention here and there that we are the best wealth management executive search firm in Switzerland. ■



“CONSEQUENT **FOCUS** ON A SELECTED AND **EXCLUSIVE** CLIENT BASE WHOSE **VALUES** ON HOW THEY CONDUCT THEIR BUSINESS ARE ALIGNED WITH WHAT WE HAVE SET OURSELVES AS GUIDING **PRINCIPLES** FOR DART AND ITS CULTURE.”

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FULL CIRCLE OF QUALITY: HOW INNOVATION PROVES WINNING APPROACH FOR DECALIA

Tom Burroughes from *WealthBriefing* talks to **Clement Maclou**, Lead Portfolio Manager for DECALIA Circular Economy.

DECALIA is active in wealth management, asset management and private markets. This business lines form a coherent whole and allow us to have a different offer. We are always looking for new ways to deliver performance in a constantly evolving investment environment. In a very standardised marketplace, DECALIA has built its franchise by following a few guidelines:

- Thematic investing: A pioneer in exploring new trends benefitting from strong secular tailwinds, we have launched several unique thematic strategies, including a fund dedicated to Circular Economy.
- Adding value through innovation: Far from the current trend towards cookie-cutter products and indexing, we constantly develop new strategies that offer better prospects.
- Adaptation to the current environment: We have investment solutions adapted to the current low-yield and high valuation environment with a range focused on four investment axes.
- In-house expertise combined with strong partnerships: DECALIA has developed a strong in-house investment team but has also forged strategic partnerships with outside expert boutiques when a specific know-how is required.

What sets you apart from your peers this year?

Founded in 2014 & FINMA regulated, DECALIA is an investment management company, managing and advising private and institutional clients' assets. Our company is owned 100 per cent by its management which ensures a long-term vision and an alignment of interest with its clients.

Our DNA comes from institutional asset management built over the past 30 years. Our investment philosophy is based on several principles: rigorous risk management, capital preservation, active management & enlisting the best talents.

Our investment funds, including UCITS-compliant strategies, are focused around four investment themes considered to be promising on the long-term: disintermediation of the European banking sector, the quest for yield,

consumer trends and market inefficiencies.

We have very excited to have launched the first global equity fund dedicated to the Circular Economy. We invest in companies benefitting from the transition to Circular Economy: Responsible Consumption, Clean Materials and Energy, Sharing Economy, No More Plastic. DECALIA Circular Economy aims for a long term solution to key sustainability issues as increasing population, environmental impact and natural resources depletion.

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

Commitment, innovation, teamwork are the core values that define who we are, what we do and what we stand for.

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

DECALIA is solution-oriented & focuses on generating risk-adjusted performance for its clients. We naturally pay particular attention to the quality of service as "behind a portfolio, there is always a person with a unique history".

Decalia aims to keep being a major innovator and disruptor while focusing on risk control in a fast moving environment. This will be ensured by a constant investment in the right people and the right solutions in accordance with a rigorous investment process.

What have the challenges been in obtaining excellence?

The challenges that Decalia have been facing are a fierce competition, a low rate environment and a rising volatility. In order to understand and overcome those challenges Decalia is constantly monitoring its peers, market dynamics and consumer trends. Our clear positioning as a boutique with a strong entrepreneurial mind-set is and will be a key differentiator.

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

Client first. Our first inspiration comes from our clients themselves. Another source of inspiration is the society itself and how it is evolving.

The investment team is monitoring changes in consumer trends in order to identify new trends (digitalisation, climate change, demographics...) and transform them into unique investment solutions such as the Decalia Circular economy fund. This strategy is an answer to our society and our clients welcome investment solutions with a positive impact on our planet.

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

We hope this accolade raises our visibility as we are a relatively young organisation. This achievement is also an encouragement to continue expanding in the same direction.

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

We will include the logo of this award in our investment presentations. ■





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EPAM UNLOCKS TRUE POTENTIAL OF MODERN TECHNOLOGY BY RELENTLESS FOCUS ON EXCELLENCE

Tom Burroughes, Editor of *WealthBriefing*, talks to Heiko Sundermann, Global Head of wealth and asset management at EPAM, about how the firm continues to stay on the front foot.

What explains how you managed to get to this award-winning level?

What helped us a lot is our experience that we gained from working with top-tier wealth management organisations on large-scale implementations, with the aim to industrialise and digitalise investment management and the advisory value chain. From this we have learned what works and what doesn't. One of the things worth mentioning is that the digitalisation and fintech hype that we saw over the last seven years. In the cold light of day it has brought to the surface many solutions that are not fit for purpose and don't address real problems banks and financial services firms face. When we embarked on this journey we had a clear view on tackling these problems at the source and finding solutions which go far beyond scratching the surface and delivering the next fancy graphical user interface.

This is also true when it came to the selection of our partners. We at EPAM have the unique ability to open the hood and really look at the technological engine room of these fintechs, and hence we have decided to only partner with fintechs that not only have a nice concept solution that can be demonstrated on PowerPoint, but do have true differentiating capabilities implemented in a technology that adheres to our demanding architectural standards.

The other important factor that enabled us to do this is the entrepreneurial spirit that is deep in the DNA of EPAM. Which was again demonstrated by the support that we received from top senior management for the idea. Last but not least, it comes down to the fantastic team both at EPAM and our fintech partners that were all fired up for the idea and were willing to go the extra mile whenever necessary.

Describe how your colleagues contributed to the success of your organisation as shown by the award?

The idea of building a leading investment management eco-system for the industry is not something that an individual or a handful of people can drive by themselves. Getting to the stage where we are required a true team effort. This spans across multiple teams and locations within EPAM but didn't end there: the spark fired up similar exceptional teams at our fintech partners at Swissquant, APIAX and Deltix. Without this strong collaboration

and the willingness to go the extra mile we wouldn't have been able to get to this result in such a short period of time. We are further proud to announce that Deltix is now a part of EPAM, adding new market-leading capabilities to our franchise when it comes to real-time algorithmics, and quantitative analysis.

What obstacles and challenges did you overcome and take on to reach this point?

The target to build an open API investment management ecosystem brings the obvious challenge with it to agree on a common taxonomy. Having a modern API architecture is not enough, the APIs need to talk the same language to really enable our clients to realize cost, quality, and time advantages and minimise the integration costs and risks. Coming to this common view was probably the biggest challenge but the result is a truly market-leading entity model which in itself is a huge benefit for our clients.

Who and what has inspired you to achieve this success and whom do you look to as a role model?

Thanks has clearly to go to EPAMs top leadership team. First and foremost to Balazs Fejes who is heading out global financial services practice that was willing to take the risk and provide the seed funding for the idea, but moreover offered is continued support and leadership throughout the entire program.

Going forward, how will you continue to set award-winning standards?

EPAM is continuously investing and adding capabilities that help our clients differentiate and be competitive through innovative use of technology. We believe that with the acquisition of Deltix we have added a very important additional pillar of capabilities to our financial services practice. Deltix brings state-of-the-art engines skills and teams in the area of quantitative finance, algorithmics, quantitative analysis and real-time data processing. These can be leveraged for wide field of use-cases in wealth and asset management, capital markets and insurances.

Having set the foundations we are now actively looking for partners in the banking, insurance and asset and wealth management domain to develop the platform further. We be-

lieve that with our entrepreneurial approach we can offer very attractive innovation partnership models to our clients and partners, which will enable us to jointly add additional features and solutions for the most pressing challenges that the industry is facing. ■

“EPAM IS CONTINUOUSLY INVESTING AND ADDING CAPABILITIES THAT HELP OUR CLIENTS DIFFERENTIATE AND BE **COMPETITIVE** THROUGH **INNOVATIVE** USE OF TECHNOLOGY.”





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RE-DEFINING PERFORMANCE



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FINANTIX GETS INSPIRED BY ITS CLIENTS TO BUILD A WORLD-CLASS BUSINESS

Christine Ciriani, Chief Commercial Officer, Finantix, talks to **Tom Burroughes** from *WealthBriefing* about the journey this firm has been on as it marks another award result.

What sets you apart from your peers this year?

In a nutshell, accelerated delivery! We have implemented global projects on-time, on-budget in consistently challenging situations while continuing to evolve our product through ongoing and consistent investment in R & D to drive innovation

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

- Client-first attitude
- True global teamwork
- Reliability and dependability

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

Continue to work closely with our clients and market analysts to evolve the Finantix product offering, to stay ahead of the curve, remain relevant, and acquire talent and product know-how through organic and inorganic growth without ever compromising our singular focus on product quality and culture.

What have the challenges been in obtaining excellence?

Finantix enables all key actors from clients to front-office to mid-office and compliance in supporting the delivery of insightful, compliant and digitalised sales and advice. Our value proposition can be adopted with enterprise-ready integrated comprehensive solutions or point-solutions. This message can be a complex one to communicate!

We are also growing and want to grow sustainably with a focus on our culture of quality, innovation, respect and reliability - so with grow come growing pains, as you might expect! Our growth needs to be carefully and consistently managed so we retain our DNA, and our focus on innovation and delivery excellence.

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

There are many examples of inspiration around us. Following Finantix's participation in Davos this year, which showed how trust and fintech go hand-in-hand, for us we find inspiration in our clients who are continuing to pave the way in re-defining themselves and are electing to service their clients in a differentiated manner.

This includes Tier One banks, who continue to evolve the products they offer across their client segments, to smaller niche players who are using digital to differentiate and attract NextGen customers through personalised service and a focus on holistic wealth management.

We also gain inspiration from working with associations on machine learning and ESG, as we look at how we can use AI to improve delivering ESG products to clients effectively, and through non-financial technology firms on how they improve workplace automation and how we would apply that to RM efficiency.

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

That our team continues to feel proud of the company they work for – an accolade like this rewards their hard work and efforts.

Second, that our clients and prospects feel they are working with a firm recognised by such a prestigious group with a strong reputation in the industry segments we work in.

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

Share the good news! We will definitely use our refreshed marketing to share the news of the award win internally with our staff who will all have contributed in some way to our award win and making it possible; and externally, using a variety of communications channels to reach our clients, prospects, alliance and delivery partners and alumni! ■

“WE ARE ALSO GROWING AND WANT TO GROW **SUSTAINABLY** WITH A FOCUS ON OUR CULTURE OF **QUALITY, INNOVATION, RESPECT AND RELIABILITY** - SO WITH GROW COME GROWING PAINS, AS YOU MIGHT EXPECT!”



CHRISTINE CIRIANI
Chief Commercial Officer
Finantix



TOP-NOTCH REPORTING KEEPS FUNDCOUNT AHEAD OF THE GAME

Tom Burroughes from *WealthBriefing* interviews **Mike Slemmer**, Chief Operating Officer-Americas, FundCount about the organisation's recent award-winning achievement.

What sets you apart from your peers this year?

FundCount software is unique in several respects. One key differentiating factor is that unlike most of our competitors, FundCount offers a single, integrated platform for all accounting activity. With no functional silos – and the headaches of “system ping-pong” -- investment accounting, partnership accounting, a real-time general ledger, and reporting are all available within one system. When combined with FundCount's automated workflow, reconciliation and compliance tools, this integrated approach maximizes efficiency for the family office.

FundCount is also unique in the breadth of coverage. In addition to marketable securities and debt instruments, FundCount manages the accounting, analysis and reporting for every alternative or private-type investment imaginable; and with clients in 19 countries, it is fully multi-currency.

Reporting is another area where FundCount excels. The ease of creating and customizing reports is unparalleled. What takes hours or days with most systems can be done in minutes, on demand, with FundCount. Clients need not ask nor pay us to build any report.

As a result, FundCount provides family offices and wealth managers with a holistic view of investment activity for greater insight, wiser investment decisions and reduced risk.

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

In addition to the deep and broad functionality of our award-winning software, FundCount owes its success to the dedicated team of account managers, developers and customer service professionals that work tirelessly to ensure customer satisfaction. We're all aligned and committed to ensuring clients get the maximum benefit from using FundCount.

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

We pride ourselves on having a client-centric approach. We listen to clients and continually enhance the software to meet their needs and changing market requirements. Reporting, for example, has come a long way in the last 10 years. Clients want to take their Excel-based spreadsheets and produce visually engaging and informative reports to share with

their customers. FundCount now integrates with Power BI and Tableau, which brings interactive visualization and business intelligence to a new level. But clients still enjoy Excel's flexibility, so in our latest release we've brought Excel-like data and formatting options into our report writer.

Integration with various applications is another area that is important to our clients because it streamlines operations and facilitates business growth. To respond to this need, FundCount has introduced pre-built integrations with the most popular customer relationship management (CRM) platforms and other best-of-breed systems.

What have the challenges been in obtaining excellence?

When you have a solution as comprehensive as FundCount and as wide-reaching – FundCount is used by single and multi-family offices, fund administrators, private equity firms and hedge funds around the world – simplicity is important. We strive to make using FundCount extremely intuitive, so even though the accounting might be complex, using the system is straightforward.

For example, wealth management structures can be incredibly intricate with various investments and layers of ownership, making it particularly difficult to track and aggregate data across the multiple entities and generations. FundCount was designed to be extremely flexible to accommodate the unique structure of each family office. It contains a capability that provides complete transparency and granularity to track the component parts of the overall “nested entity” family structure. Reports can be generated that instantly show the family entity relationships as well as inter-entity reconciliation, investment activity and disbursement through the various layers of entities.

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

The *WealthBriefing* franchise is well respected in the industry. As a result, wealth managers often look to the awards to discover vendors to include in their software buying decision process. Winning the award for *Best Client Accounting* builds credibility and even greater awareness of FundCount's capabilities across a wider audience. ■

“FUNDCOUNT SOFTWARE IS **UNIQUE** IN SEVERAL RESPECTS. ONE KEY **DIFFERENTIATING** FACTOR IS THAT UNLIKE MOST OF OUR COMPETITORS, FUNDCOUNT OFFERS A SINGLE, **INTEGRATED** PLATFORM FOR ALL ACCOUNTING ACTIVITY.”



RELENTLESS FOCUS, FORWARD-LOOKING APPROACH WINS ADMIRERS FOR GENEVA MANAGEMENT GROUP

Tom Burroughes of *WealthBriefing* talks to **Dave Elzas**, Chief Executive and Co-founder of Geneva Management Group, about its success.

The firm won the award for *Best Innovative Client Solution*. Founded in the year 2000, Geneva Management Group (GMG) has grown to a staff complement of 200 people and boasts 3 billion AUM across 9 countries. "We're a diversified and innovative financial solutions provider; we service both private as well as business-to-business clients."

What sets you apart from your peers this year?

We have gained recognition this year by being extremely dedicated and by thinking forward, anticipating clients' needs. We're an extremely innovation focused team. We work hard and we listen to clients, understand what they want with the goal of anticipating their needs.

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

GMG is a really entrepreneurial-based business, with an institutional framework. We look for young people who can think independently and challenge management.

Having aggressively forward-thinking colleagues, bringing individuals and teams together really does get results. It's about constant feedback, about choosing the right people who are ambitious and who want to improve what we do as an industry.

Who inspires you, either inside or outside the wealth management industry?

Our clients are our inspiration. They are extremely hardworking and focused people who have achieved high levels of success. They inspire us daily to work as hard as being effective and relevant as they are in their own businesses.

What do you hope will be the main consequence of receiving this award?

We are very proud to have received this award and we believe in its prestige in our industry. It is an accolade which is an internal motivator for our teams, which also leverage increases our visibility within the financial industry.

As a Swiss company that operates internationally, receiving this award boosts the image of Swiss quality GMG's offering in particular. This is a real complement to our own ambitions.

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

Having been recognised by a distinguished publication in this space will give us more exposure and visibility in the industry.

It's a feather in GMG's hat that we celebrate and appreciate. ■



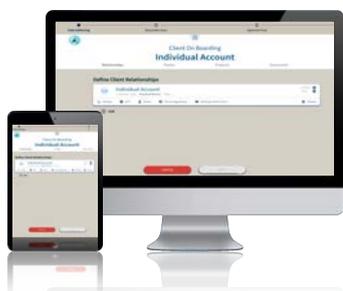
"GENEVA MANAGEMENT GROUP (GMG) IS A **DIVERSIFIED AND INNOVATIVE FINANCIAL SOLUTIONS** PROVIDER; WE SERVICE BOTH PRIVATE AS WELL AS BUSINESS-TO-BUSINESS CLIENTS."



id4 Digital Client Lifecycle Management

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-  Central File
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-  Management



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MOVING FAST COUNTS FOR WEALTH MANAGERS WITH TECHNOLOGY FIRM ID4

Tom Burroughes from *WealthBriefing* talks to **Emmanuel Nay**, Chief Sales Officer and Co-Founder of id4 AG about how its technology-driven solutions give its clients a big advantage.

id4 AG proposes an out of shelf fully digital solution for Client Lifecycle Management (Client On-boarding, KYC Reviews...) and Client Data Management (CRM, Sales...) for small and mid-sized financial institutions such as Private Banks, Family Offices, External Asset Managers and Pension Funds. It includes modular screens & rules, fully dynamic form generation, intelligent QR scanning document management, electronic signature and integration with a constantly increasing list of third party services.

CLM4.bank - our product - is set up on premises or on the cloud. The implementation time is very short as it does not require any client specific development nor testing. Clients can use the solution as it is with all the complete set of fields and rules we recommend, or customise them without changing the code of the solution. As such it is an excellent product for business process outsourcers or other financial institutions software providers since they can use the same solution across their platform and quickly customize it for each of their clients.

CLM4.bank is sold as a service providing regulatory compliant Client Data Management and Client Lifecycle Management, constantly enriched from private banks' best-practice rules and third party compliance added-value services.

What sets you apart from your peers this year?

Peers announce their next-generation platform is Low-code. We are already one step ahead with our No-code customizable approach. Our product, CLM4.bank, is unique in the sense that it proposes an off-the-shelf solution that is fully configured with constantly updated compliance best practices of the market. There is no development nor is there any testing involved for a client set-up. Clients can change business requirements directly with immediate effects without any IT development. Time to market is immediate. It does not require a development team and internal resources to define the requirements.

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

The team has been involved in the largest compliance related projects in Switzerland and up to eight international locations for the

past six years: the accumulated knowhow and best practice is immediately recognised by our clients. Our clients' feedback is very often about our energy, passion and professionalism in the front office and compliance sector.

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

We have many features in our product development roadmap. We will involve more market expert reviewers to validate our set of rules, and imbed in our solution links to compliance related third parties services adding value to the client lifecycle management. We set the goal of our services to be a one stop integrated Client Lifecycle Management and Client Lifecycle Management solution, providing integration to live and automated services such as external compliance experts and screening tools and services.

What have the challenges been in obtaining excellence?

Many regulatory rules are subject to interpretation, very often they are describing a line of conduct rather than a list of fields and formulas for the rules. Getting the correct expertise went through years of work with the best compliance teams, tax and legal advisors in private banks. Most of the time they might not all agree together. Defining the best practice has been and always will be the challenge.

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

The wealth industry is at the beginning of drastic changes towards the digitalisation bringing along a new way of doing business. Some precursors show the way by starting to outsource their core system to large IT players; some use cloud solutions, some rely on external optimised expertise and services, while keeping the security standards to the maximum. They open to an array of services providing them with the best in class in each field at a reduced cost.

These precursors inspire us and help us define the compliance solution of tomorrow. We strive to bring the best of the Client Lifecycle Management solutions and third parties in an efficient one stop system.

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

id4 is new in the market, it is a young start-up that is financially secure thanks to a solid investor. We offer many guarantees to our clients in terms of the future of the company.

The award will increase id4's visibility on the market and hopefully convince more clients. On the team side, this award is an extraordinary boost in our motivation to continue providing the best solutions.

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

We are very proud to have won this award early 2020 for Compliance in Wealth Management. It demonstrates to our potential clients the professionalism and competence of our team.

We will leverage on this prestigious price to reach out to a larger community amongst banks, wealth managers, business process outsourcers and third-party service providers. ■



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INDOSUEZ WEALTH MANAGEMENT'S CHIEF ECONOMIST LEADS BY CONSTANTLY SEEKING ANSWERS

Dr Marie Owens Thomsen, Global Chief Economist of Indosuez Wealth Management, talks to *WealthBriefing's* Group Editor **Tom Burroughes** about her outstanding contribution to industry thought leadership.

What sets you apart from your peers this year?

Hard for me to say, but I can say what I seek to do - I seek to empower my audience. This is firstly about avoiding jargon and trying to communicate clearly. Secondly, we need to put the events in the world around us in the proper perspective. Thirdly, it is about trying to spot trends and phenomena early. In this way, I believe that we can make economics more accessible and pertinent to people and help protect all consumers of financial services.

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

I am very grateful to Indosuez for their support and trust. Moreover, the bank's emphasis on providing "thought leadership" - beyond the immediate investment concerns our clients might have - is very positive. This is well illustrated by our "Wealth & Beyond Summits" where we try to address the most pressing issues that not only private investors - but any human - faces today. Moreover, my colleagues in all areas of the Bank are a phenomenal source of inspiration and support - together we make a difference, I believe.

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

Keeping the standard is about being curious and having the energy to pursue the search for answers. I think I am very curious. As for the energy, I should probably do more sports! Keeping the standard is also about a certain rigour: always fact check, and try to push the boundaries of the discussion beyond what the last person said. I promote open discussions where diverse opinions are welcome and intellectual curiosity can flourish.

Today's environment is challenging in that respect. Pushing ahead in the future is largely about the younger generation and I hope that we can attract more young people to the field of economics.

What have the challenges been in obtaining excellence?

Nobody can be a better economist than the quality of the data they have. Rather astonishingly, in this information age, we still struggle to obtain the data we need. Otherwise, I tend to think that if you love what you do, you will probably spend quite a lot of time doing it, and this tends to yield results. It sometimes takes some courage to defend your analysis in the face of opposition but this becomes easier if you have done the research to the best of your abilities. One can then be confident in the results oneself and hence more convincing in public settings.

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

I consider John Kenneth Galbraith (1908-2006), who served under four US Presidents, to be the Shakespeare of Economics for his stellar writing and the phrases he coined - including "conventional wisdom" - a phenomenon I do my best to combat! He also said that all economics can be put in plain English, which I believe is very important if we seek to engage - not alienate - people in today's society.

My list of inspiring women starts with Anna Jacobson Schwartz (1915 - 2012). She wrote "A Monetary History of the United States" with Milton Friedman (in 1963), but only he received the Nobel Prize (no comment!). Janet Yellen, the Fed's first woman Chairperson, is definitely worthy of great respect in our times.

Amongst my contemporaries I admire Kurt Schiltknecht, Chief Economist at the Swiss National Bank in the 1980s and Carlos Lenz, their current Chief Economist. I also have great respect for Valérie Lemaigre, Chief Economist at BCGE. I have to conclude with John Maynard Keynes - who firmly placed people at the centre of economics - something I endeavour to do on in all my research.

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

Team pride! I hope all my colleagues and clients can feel a bit more proud of our bank. Perhaps it can also help to attract talent and new clients. Ideally, it may also draw younger people and more women to the field of economics.

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

Well, this is really a question for our communications department, but I hope that we will be able to share the good news as widely as possible! I would like to add that I am very honoured and grateful to be chosen for this award. I feel it validates the research style and strategy that we have been pursuing, and that is most gratifying. Vanity is a sin, but compliments sure feel good! ■





LOMBARD ODIER'S DEEP EXPERTISE & PERFORMANCE DELIVERY COMES THROUGH FOR CLIENTS

Andreas Arni, Head of the Swiss domestic market and **Philippe Gay**, Head of the Swiss offering at the firm, talk to **Tom Burroughes** of *WealthBriefing* about its awards success.

What sets you apart from your peers this year?

I would like to start by saying that we have seen excellent growth rates for new Swiss domestic clients. With numbers rising 6 per cent a year for the last three years, the new clients who are choosing Lombard Odier are endorsing our value proposition. All of our management strategies performed well over the past year. Sector comparison tools indicate that our strategies actually outperformed our rivals. Inflows into new funds are also outstanding, with growth rates at twice the market average, according to indicators showing the total banking assets of high-net worth clients in Switzerland. We have also undertaken a number of large-scale sustainability projects over the past few months. For example, we became the first global wealth and asset manager to obtain the prestigious B Corp certification. We are acknowledged sustainability experts within the sector and were selected from a shortlist of a dozen candidates to advise Credit Suisse on managing a sustainable investment fund.

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

The teams in all five Swiss offices had a solid year in 2019, boosting the overall results for Switzerland. Wealth management has changed a great deal in recent years, especially in Switzerland. Our bankers are constantly expanding their global wealth management and advisory skills, with a particular emphasis on achieving the best performance net of taxes. Our experts have also been developing their knowledge of debt investments, such as finance for real estate projects. As a pension expert, we are increasingly gaining recognition for our management of vested benefit assets and non-compulsory pension plan. Assets under management broke through the SFr1 billion barrier in the first

half of 2019 and continue to grow. I should also mention the great work done by all our teams in structuring and offering solutions targeted at Swiss entrepreneurs - solutions that reflect the particularities of their tax and wealth situations. Building up additional expertise remains an essential feature of the quality of service quality provided to domestic clients, both now and going forward.

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

We will continue to listen closely to our clients' wishes and expectations, while also exploring sources of significant added value that they have not yet necessarily identified. In particular, we are thinking here of areas such as unlisted assets and sustainable investments, where we have become an acknowledged expert. We will also continue to stress to clients that all performance must be measured net of costs and taxes. In the interests of efficiency and transparency, our value proposition reflects that emphasis. We are determined that clients have a positive experience in all their interactions with us, irrespective of whether they speak to a person or use our technology. We continue to invest to ensure we meet the highest standards. Finally, looking beyond financial considerations, wealth management needs to be viewed in the context of longer-term changes, with greater emphasis on next-generation issues and national/international mobility.

What have the challenges been in obtaining excellence?

In our position, it is important not only to deliver top-class wealth management solutions, but also to constantly question our approach, to innovate and explore new options. That involves listening carefully to our clients,

undertaking a detailed analysis of our environment and providing ongoing training for our banking staff, so we demonstrate the relevance of our approach on a daily basis.

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

Our clients and prospective clients are often an inspiration for us. They all have very different outlooks, but frequently they share a number of common interests and concerns. They inspire us by telling us how and why their businesses succeed, for example, encouraging us to keep aiming higher.

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

This prize rewards and acknowledges the hard work put in by our teams and is an endorsement of our strategy. It encourages us to continue to work hard on behalf of all our clients.

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

It also effectively rewards the clients who have chosen us as their partner. This is something worth sharing with existing and potential clients. It's the sort of reward that drives our ambition to be the best every year and pushes us to always strive for excellence. ■



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Image: Brass Balances

These brass balances were used for precise weighing of the Rothschild branded gold bars produced at the Royal Mint Refinery in east London from 1852, which was set up as part of the firm's role in shipping newly discovered gold from Australia and America.

Courtesy of The Rothschild Archive.



GETTING THE CULTURE RIGHT AT ROTHSCHILD & CO

Tom Burroughes of *WealthBriefing*'s talks to **Laurent Gagnebin**, Chief Executive, Rothschild & Co Bank AG, about the successes achieved by his organisation.

What sets you apart from your peers this year?

It's probably not one single point, but our ability to combine continuity, reliability and innovation in our overall approach to clients and investments. We focus on long-term investment strategies whilst delivering a very personal journey to our clients, with only 24 clients per advisor. Of particular help to our international clients is our global network of more than 3,500 professionals providing advice and services across the financial services sector.

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

An award like this is, of course, the result of strong teamwork. Besides our client advisors, our investment team also did a great job in 2019. The team delivered excellent performance across multi-currency portfolios whilst consistently outperforming investment peers. In addition, our global network of colleagues was able to deliver cross-border investment advice to clients and provide them with a global investment view.

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

We keep our focus on just a few target markets where we have a deep understanding of all the relevant factors and a good local network of experts. In addition, and despite the general pressure on margins, we continue to invest in very personal and long-term client relationships. We're also continuously expanding our open architecture product platform and in-house expertise in all asset classes.

This is illustrated in our in-house private equity, private debt and co-investment

capabilities with the latter offering setting us apart from most other banks. Of course, we also continue to invest into new digital solutions to enhance our clients' access to our services, insights and investment materials.

What have the challenges been in achieving excellence?

I think one of the most important aspects is a cultural one. For us it is crucial to have the right people for the delivery of an individualised and high-quality client journey. This is particularly so given our independent investment approach, which does not favour in-house products and supports a completely open investment architecture. Our client advisors therefore need to be extremely well trained and have a deep understanding of our investment universe.

In addition, like many banks, we face a challenging regulatory environment and have met this challenge by investing in both the IT and manpower needed to meet regulatory requirements and improve our services to clients.

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

A very inspiring person for me is Claude Nobs, the founder of the famous Montreux Jazz Festival. He created this outstanding event and established it as one of the best-known music festivals in the world. In my view he personifies hard work, perseverance and creativity.

Crucially, he was able to reach out to people and develop strong personal relationships with artists, in order to build the festival in to a world-class event.

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

Our aim is always to offer the best service for our clients' needs. Winning such a renowned award is a great accolade for our teams and will no doubt motivate them to continue to deliver exceptional service.

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

We will use the award when communicating with our clients and partners, as we did with previous *WealthBriefing* Awards. For us, it is a sign of quality and we are delighted to use the award when engaging with prospects and clients. ■



“I THINK ONE OF THE MOST **IMPORTANT** ASPECTS IS A CULTURAL ONE. FOR US IT IS **CRUCIAL** TO HAVE THE RIGHT PEOPLE FOR THE DELIVERY OF AN INDIVIDUALISED AND **HIGH-QUALITY** CLIENT JOURNEY. THIS IS PARTICULARLY SO GIVEN OUR INDEPENDENT INVESTMENT **APPROACH**, WHICH DOES NOT FAVOUR IN-HOUSE PRODUCTS AND SUPPORTS A COMPLETELY OPEN INVESTMENT ARCHITECTURE.”



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STAYING AHEAD OF RAPID CHANGE: HOW SCHELLENBERG WITTMER KEEPS DELIVERING HIGH-END SERVICE

Tom Burroughes from *WealthBriefing* talks to **Bernard Vischer**, Head of the Private Wealth Group in Geneva, Schellenberg Wittmer, about the effort required to keep it at the top flight in its sector.

What sets you apart from your peers this year?

This past year, Schellenberg Wittmer's Private Wealth team has been involved in several complex and significant estate planning and estate liquidation cases, as well as litigations. More often than not, because of the nature of the assets (real estate, art, operating companies), those cases seamlessly involve other practice groups of the firm, in particular the tax, real estate and banking teams. Moreover, as a result of the cross-border aspects, we have been working closely with correspondents abroad.

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

Each colleague within the Private Wealth Group and other practice groups involved has played his/her role in delivering precise, practical and timely service, resulting in an effective teamwork. We regard it as essential for our practice to share our knowledge and to combine the expertise from the different team members that are necessary to serve the clients' needs.

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

We will, as a team, strive to keep abreast of the latest legal developments in Switzerland and abroad. In fact, we do not only inform ourselves, but endeavor to shape the changes. We do so by being actively involved in professional associations such as STEP, maintaining a close contact to the academic world (one counsel of our Private Wealth team is professor at the Zurich University) and building a

trusted relationship with public administrations and governmental bodies.

What have the challenges been in obtaining excellence?

The biggest challenge has been and will be indeed to cope with the pace of changes in the regulatory environment and with their impact on private wealth. We will endeavour to master the complexities and find simple, efficient solutions for our clients.

Whom do you look up to for inspiration and examples to emulate and compare yourself?

Our assignments regularly lead us to collaborate with competitors in Switzerland and abroad. These collaborations are always great opportunities to learn, share and exchange knowledge and overall they stimulate us to further improve our service. This is also the case when we work with our institutional clients such as banks and family offices with whom we strive to establish long term relationships as partners.

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

We are very proud that our efforts to reach excellence and our teamwork have been recognized, as we are fully aware that we have many competitors who could equally pretend to the accolade. It gives us confidence that we do the right thing to best serve our clients.

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

We will of course publicise it, but we do not need to do anything more, the award speaks for itself. ■



“EACH COLLEAGUE WITHIN THE PRIVATE WEALTH GROUP AND OTHER PRACTICE GROUPS INVOLVED HAS PLAYED HIS/HER ROLE IN DELIVERING **PRECISE, PRACTICAL AND TIMELY** SERVICE, RESULTING IN AN **EFFECTIVE** TEAMWORK. WE REGARD IT AS **ESSENTIAL** FOR OUR **PRACTICE** TO SHARE OUR **KNOWLEDGE** AND TO COMBINE THE **EXPERTISE** FROM THE DIFFERENT TEAM MEMBERS THAT ARE NECESSARY TO SERVE THE CLIENTS' NEEDS.”



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BIG BUT ALSO NIMBLE: SOCIETE GENERALE DELIVERS A COMPELLING SWISS OFFERING

WealthBriefing's **Tom Burroughes** talks to Societe Generale's Private Banking arm about the qualities that won it plaudits.

What sets you apart from your peers this year?

Societe Generale is a leading European financial services group, with a diversified and integrated banking model. Private banking and wealth management are strategic and core businesses for Societe Generale. We offer:

- A complete range of private banking services: wealth management, credit, wealth planning, alternative investments, diversification solutions, etc.

- Direct access to the group's full range of corporate and investment banking solutions: markets, derivatives and structured products, securities services, Lyxor (Asset Management), ALD Automotive (Fleet management & Leasing), equipment finance, trade finance.

Societe Generale places client satisfaction at the heart of its activity. We are an innovative and responsible company, with strong and long-term commitment in terms of social, corporate and environmental responsibility. Regarding more specifically the Swiss private banking market, we deliver complementary capabilities to local players and "fill a niche". We also leverage our global footprint and competitive edge in the eurozone and put our strong balance sheet to work.

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

Being part of a global banking group with 149,000 employees not only provides significant financial strength, but also comprehensive capabilities. We put these capabilities and expertise at the heart of our client services. For example, regarding international clients and/or ultra-high net worth individual.

We're a truly client focused team of British, French & Swiss nationals partnering with clients, their advisers and our extensive networks to deliver tailored solutions. We consistently collaborate across markets and group entities to support new business and client development.

A recent case best illustrates our team spirit, agility and expertise: A multi-banked client relocated to the UK at short notice. We immediately mobilised a team of experts to review the situation, goals and agree the tight timeline. In conjunction with the client's tax advisors, our French and UK wealth planners helped plan the client's exit from France and arrival in the UK. Leveraging the expertise of our Luxembourg team, we sourced the most suitable whole of market insurance solutions. We introduced the best specialist advisors to ensure that the policy was established to achieve the family's

long-term security and succession planning goals. In addition, our UHNW team gathers highly skilled and talented professionals, both client relationship managers and Investment managers. Their past experiences comprise of corporate banking, asset management, international private banking and tax planning. Our common goal is to accompany clients to protect and create long term value for their family wealth, via a large toolbox in asset management and credit solutions

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

Being a European bank with a global footprint, Societe Generale has been committed to Switzerland for over 120 years - and we continue to do so as we have an important role to play. More than ever, Societe Generale places client satisfaction at the heart of its activity: We are an innovative and responsible company, with strong and long-term commitment in terms of social, corporate and environmental responsibility. For the future, SGPBS has a strong ambition to improve the level of satisfaction of all its employees and invests heavily in skills development. More specifically, for the last 18 months, the bank has created a training and development program tailored to its talents, with a dual objective:

- For employees: to make them grow, by proposing unique and original development actions. A career booster for three years for three communities: junior / intermediate / senior talents.

- For the bank: to identify, develop and retain our future leaders.

This investment is key to continue to provide our clients with the best services and tailor made solutions.

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

Yes. This award is for us, as an institution, and also for all our staff a significant recognition of Societe Generale Private Banking's commitment to Switzerland. We of course thank our client for their trust. ■



SCHRODER & CO BANK SETS THE PACE BY MAKING CLIENTS COMFORTABLE

Tom Burroughes of *WealthBriefing's* talks to Roger Althaus, Head of UK, Zurich, Schroder & Co Bank AG, about how this firm scaled the heights to award-winning level.

What sets you apart from your peers this year?

We put the client at the centre of everything we do. We position ourselves as a partner of choice, giving our clients peace of mind. As a first step, we identify our clients' needs, which then allows us to define tailored solutions that the clients understand and feel comfortable with.

Being perceived by our clients as a trusted partner upon whom they can rely is key to us. This requires a bespoke and pro-active approach, reflecting the principles Schroders Wealth Management stands for.

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

Servicing wealth management clients can only be successful if a team works as one, is as a whole informed about the clients' needs and circumstances.

We put a lot of emphasis on making the client comfortable with the organisation by introducing deputies, assistants and investment specialists. It is important that the client notices that integrated approach.

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

The award is a big motivation to continue on the path we are on and to further enhance the client experience.

What have the challenges been in achieving excellence?

We need to be continuously aware of the changing circumstances in the UK market, the concerns and challenges that clients experience or are confronted with.

Equally, we need to keep up with the changes in the regulatory and tax environment. Having access to a network of savvy UK-based professionals is crucial but also time consuming as you have to balance your time between intelligence gathering and servicing your clients.

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

I do not have a real idol but rather strive to improve how to fulfil my role to the best of my abilities. This also includes learning from others, sharing experiences and understanding what our clients really want.

This is what drives me, supported by both positive and negative feedback from clients and colleagues.

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

Confirmation that we are on the right path. Also, gaining further motivation to excel and, hopefully, collecting more awards!

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

We believe that this award demonstrates that Schroders Wealth Management is the right partner for UK resident high-net-worth clients, serving as a testament to our commitment to put clients first and to deliver a first-rate performance in all aspects of the relationship. ■

“WE BELIEVE THAT THIS AWARD DEMONSTRATES THAT SCHRODERS WEALTH MANAGEMENT IS THE RIGHT PARTNER FOR UK RESIDENT HIGH-NET-WORTH CLIENTS, SERVING AS A **TESTAMENT** TO OUR **COMMITMENT** TO PUT CLIENTS FIRST AND TO DELIVER A FIRST-RATE **PERFORMANCE** IN ALL ASPECTS OF THE RELATIONSHIP.”



STAYING ON TOP OF FAST DIGITAL TRENDS: HOW TECHRULES EXCELS

Tom Burroughes of *WealthBriefing's* talks to **Jaime Bolivar**, Managing Director at TechRules, about how its digital transformation work has won it plaudits.

TechRules is a leader in digital transformation for Wealth and Asset Management, a leading consultancy service and a Wealth Management Software provider for financial entities. We develop modular, scalable and APIfied technology to solve specific customer's needs. We provide WealthTech expertise for business automation in financial entities based on AI and according to regulatory requirements. In our website (www.techrules.com), you can find a full outlook of our work in AI, gamification, sentiment analysis and other fintech fields.

What sets you apart from your peers this year?

Our main advantage compared to our competitors is our ability to adapt quickly to any kind of developments. We have consolidated a position as very specialised provider in modular, white label and scalable solutions. This is part of our success, because our modules and APIs are easy to integrate in any platforms with a wide range of compatibility and very low degree of errors.

Last year, we focused our work in powerful financial planning modules linked to AI and machine learning. We also applied blockchain for financial entities, as a first step of a technology that has a long future in this sector.

Finally, we profit from our long experience, because in these 25 years we have developed solutions to cover all kind of tasks, products and services. Our platform Tower has been updated to integrated new APIs. We have applied cutting-edge technologies for robo-advisors and tools for self directed investors. Additionally, we have consolidated our services to create model portfolios and fund factsheets automatically. That means, a financial company can cover all their demands with us.

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

TechRules is impossible to understand without my colleagues and the full company staff. TechRules is human knowledge applied to finances and new technological developments in this field. The whole team is committed with the company goals and the clients, they are competent, trustworthy and always ready to learn and improve. They are key for our success.

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

We cannot say that we expect changes in the sector. When you say fintech, the word "change" is included in the meaning. Change is

part of the sector in products, services, technologies, assets... Taking this point into account, we consider that we are ready for the immediate 5 trends to focus:

- Regulation and customer protection, as they are more complex and harder to comply.
- Full digital experience, in order to be more user-friendly, accessible and easy to understand.
- Aggregated financial planning to apply AI and obtain more scalable results.
- Real-time communications to differ from competitors, as you provide a specific personal attention to final customers.
- Easy adoption of solutions per entity: combining standardization to optimize implementations and processes with tailored solutions to provide a personal imagen and strengthen the company brand.

Listening is a word that everybody uses, but only seldom applies. We apply it always, because listening helps us not only bringing the best solutions, but also detect future trends. That is the best way to adapt continuously in this competitive changing market.

Additionally, we invest a lot in R&D on a yearly basis. We have recently invested in SaaS, PaaS and APIfied all our solutions in a very short term, actually, less than a year.

What have the challenges been in obtaining excellence?

The main challenge is staying always at the top of the industry and growing further. That is only possible with a historical background of success and a competitive well-trained staff. Fintech companies asks for very professional profiles ready to develop tailored state-of-art solutions. It is not easy to begin in this sector. That is why we are proud of delivering knowledge for our clients, because that is the key to solve any challenge.

Specifically, we will keep on working on our high-standard API Financial Management Marketplace and improve the full set of solutions: Advice APIs, Generic APIs, Portfolio Analytics, Model Portfolio and Investment Tools.

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

It is incredible how the industry changes with the democratization of investments through the robo advisors solutions and other very similar. Just to mention some of the more interesting because of their developments or their business model: Revolut, Monzo and Nutmeg. They

have pointed new ways in user experience and full functionality on mobile devices.

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

This kind of achievements are like fresh air, because, somehow, they report that you are doing something right and your customers will also perceive that their bet for us was right, too. It has been more that 20 years to reach this point and we can proudly say that we have performed powerfully this time. Additionally, this award is second to none, as *WealthBriefing* has a very relevant position in the market.

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

We will explain our clients that this accolade is the result of a continuous commitment with the projects in which we work for them. It will help us strengthen our brand marketing, as the award supports that we are innovative, trustworthy and competent to develop the best solutions for financial companies and professionals. It will also help to broaden our customer portfolio, as we will be able to report that we were awarded by one of the most relevant prizes in the sector. ■





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BEST ASSET MANAGEMENT FIRM SERVING FAMILY OFFICES AND PRIVATE BANKS



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WINNERS: PRIVATE CLIENT CATEGORIES

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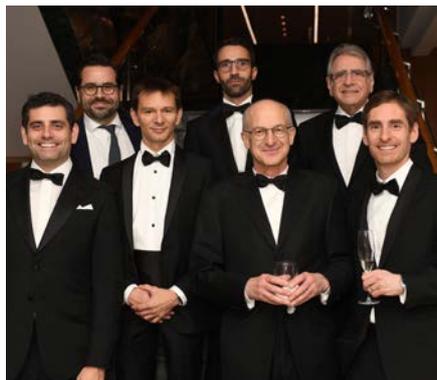


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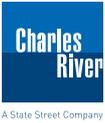
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WINNERS: PRIVATE BANKING CATEGORIES

BEST PRIVATE BANK – CUSTOMER FACING DIGITAL CAPABILITIES



BEST FAMILY OFFICE OFFERING



BEST PRIVATE BANK – CREDIT PROVIDER



BEST UHNW TEAM (INTERNATIONAL CLIENTS)



BEST PRIVATE BANK – TALENT MANAGEMENT



BEST UHNW TEAM (SWISS DOMESTIC CLIENTS)



BEST PRIVATE BANK – INVESTMENT MANAGEMENT PLATFORM



BEST HNW TEAM (INTERNATIONAL CLIENTS)



BEST PRIVATE BANK – CLIENT SERVICE



BEST HNW TEAM (SWISS DOMESTIC CLIENTS)



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(in-house solutions only)

WINNER: MARKETING/PR CATEGORIES

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BEST MARKETING OR PR CAMPAIGN



LOMBARD ODIER
LOMBARD ODIER DARIER HENTSCH



WINNERS: OTHER WEALTH MANAGEMENT CATEGORIES

BEST CORPORATE SOCIAL RESPONSIBILITY/ DIVERSITY



LOMBARD ODIER
LOMBARD ODIER DARIER HENTSCH



BEST WEALTH PLANNING TEAM



The art of finance.



BEST WEALTH MANAGEMENT EXECUTIVE SEARCH FIRM (SWITZERLAND)



WINNERS: LEADERSHIP CATEGORIES

BEST OUTSTANDING CONTRIBUTION TO WEALTH MANAGEMENT THOUGHT LEADERSHIP (COMPANY)



what wealth needs next



BEST WOMEN IN WEALTH MANAGEMENT (INDIVIDUAL CONTRIBUTION)

NATACHA ONAWELHO-LOREN



BEST OUTSTANDING CONTRIBUTION TO WEALTH MANAGEMENT THOUGHT LEADERSHIP (INDIVIDUAL)

MARIE OWENS THOMSEN



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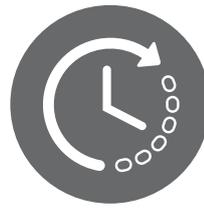
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