



WealthBriefing **EUROPEAN**
AWARDS 2022

LONDON
MARCH 2022

The Tenth Annual *WealthBriefing*
European Awards

INFORMATION PACK

10TH
ANNIVERSARY

Overview

Introduction

A warm welcome to the Tenth Annual *WealthBriefing* European Awards 2022.

Conducted by expert panels drawn from both private banks and trusted advisors/consultants to the sector, independence, integrity and genuine insight are always the watchwords of the judging process.

Categories

For those new to the awards, the categories are focused around three main areas:

- Experts (individuals and teams)
- Products
- Services for wealth managers and clients/institutions of all sizes and types

Judging

There are three judging panels for the awards:

A panel of trusted advisors who will be responsible for judging the family office and private banking categories. A second panel of family office and banking professionals judge the trusted advisor categories and a third panel is dedicated to assessing submissions within the technology section.

This is to ensure that at all times commercially sensitive information is kept confidential and to avoid conflicts of interest.

We very much hope you take part and look forward to seeing you at the 2022 Awards Ceremony.

Key dates for the diary:

Nominations open	2 September 2021
Submission deadline	17 December 2021
Finalists & Winners Notified of Their Success	1 February 2022
PUBLIC ANNOUNCEMENT & GALA CEREMONY	30 March 2022



Categories & Criteria



EUROPEAN WEALTH MANAGEMENT CATEGORIES

OVERALL EUROPEAN PRIVATE BANK

Awarded To: A Europe based private bank which has demonstrated excellence across a range of disciplines.

DOMESTIC CLIENTS TEAM

Awarded To: A team whose clients are domiciled in the jurisdiction in which the bank itself operates. Focus can be HNW or UHNW.

INTERNATIONAL CLIENTS TEAM

Awarded To: A team whose clients are NOT domiciled in the jurisdiction in which the bank itself operates. Focus can either be HNW or UHNW.

HNW TEAM

Awarded To: A team who look after clients with under EUR 20 million with the bank.

UHNW TEAM

Awarded To: A team who look after clients with over EUR 20 million with the bank.

PRIVATE BANK - CLIENT SERVICE

Awarded To: A private bank for excellence and innovative client service.

PRIVATE BANK - INVESTMENT MANAGEMENT PLATFORM

Awarded To: A platform providing securities, fund wraps or funds to enable investors to buy and hold securities and funds on the platform.

PRIVATE BANK - CLIENT INITIATIVE *

Awarded To: A private bank or wealth management organisations which have, with a new product or service initiative, significantly enhanced their overall offering.

PRIVATE BANK - TALENT MANAGEMENT

Awarded To: A private bank demonstrating superior talent acquisition, training support and management.

PRIVATE BANK - CREDIT PROVIDER

Awarded To: An institution that provides credit for family office, UHNW and/or HNW clients.

PRIVATE BANK - LEADERSHIP TEAM *

Awarded To: A senior management team in any private bank in Europe.

PRIVATE BANK - OPERATIONS TEAM *

Awarded To: An operations team in any private bank in Europe.

PRIVATE BANK - CUSTOMER FACING DIGITAL CAPABILITIES (BANKING)

Awarded To: A private bank that demonstrates superior client facing digital capabilities in banking through mobile apps or online banking delivered in conjunction with advisors.

PRIVATE BANK - CUSTOMER FACING DIGITAL CAPABILITIES (INVESTMENTS)

Awarded To: A private bank/wealth manager that demonstrates superior client facing capabilities in investment management through mobile apps or online investment management. This can cover investment ideas, objectives, portfolio construction, simulation, alerting and rebalancing that are delivered in conjunction with advisors.

PRIVATE BANK - WEALTH PLANNING TEAM

Awarded To: A team that has excelled in performing wealth planning services.

PRIVATE BANK - INTERNATIONAL WEALTH PLANNING TEAM *

Awarded To: A team that has excelled in performing wealth planning services.

WEALTH MANAGEMENT BUSINESS - BENELUX REGION

Awarded To: A wealth management business located in Belgium, Netherlands, Luxembourg or wealth manager/team servicing any or all of these countries.

WEALTH MANAGEMENT BUSINESS - NORDIC REGION

Awarded To: A wealth management business located in Finland, Sweden, Denmark, Norway, Iceland or wealth manager/team servicing any or all of these countries.

WEALTH MANAGEMENT BUSINESS - IBERIAN REGION

Awarded To: A wealth management business located in Spain, Portugal, Andorra or wealth manager/team servicing any or all of these countries.

WEALTH MANAGEMENT BUSINESS - CENTRAL OR EASTERN EUROPEAN REGION

Awarded To: A wealth management business located in Austria, Germany, Hungary, Poland, Slovakia, Czech Republic, Russian Federation, Ukraine, or wealth manager/team servicing any or all of these countries.

WEALTH MANAGEMENT BUSINESS - THE PRINCIPALITY OF MONACO

Awarded To: A wealth management business located in or wealth manager/ team servicing Monaco.

Categories & Criteria

UNITED KINGDOM PRIVATE BANKING CATEGORIES

OVERALL UK PRIVATE BANK

Awarded To: A UK-based private bank that has demonstrated excellence across a range of disciplines within the HNW/UHNW sector.

DOMESTIC CLIENTS TEAM

Awarded To: A team whose clients are domiciled in the jurisdiction in which the bank itself operates. Focus can be HNW or UHNW.

PRIVATE BANK - INTERNATIONAL CLIENTS TEAM

Awarded To: A team whose clients are NOT domiciled in the jurisdiction in which the bank itself operates. Focus can either be HNW or UHNW.

PRIVATE BANK - OPERATIONS TEAM *

Awarded To: An operations teams in all private banks in United Kingdom.

HNW TEAM

Awarded To: A team that looks after clients with under £20 million with the bank.

UHNW TEAM

Awarded To: A team that looks after clients with over £20 million with the bank.

WEALTH PLANNING TEAM

Awarded To: A banking team that is dedicated to clients' tax, trust and wealth structuring issues.

INTERNATIONAL WEALTH PLANNING TEAM *

Awarded To: A banking team that is dedicated to clients' tax, trust and wealth structuring issues.

PRIVATE BANK - CLIENT INITIATIVE *

Awarded To: A private banks or wealth management organisation which have, with a new product or service initiative, significantly enhanced their overall offering.

CHARITY TEAM

Awarded To: A team working within a wealth management organisation or stand-alone business offering advice and fulfillment to charities.

PRIVATE BANK - CLIENT SERVICE

Awarded To: A private bank for excellence and innovative client service.

PRIVATE BANK - INVESTMENT MANAGEMENT PLATFORM

Awarded To: A platform providing securities, fund wraps, funds to enable investors to buy and hold securities and funds on the platform.

PRIVATE BANK LEADERSHIP TEAM *

Awarded To: A senior management team in all private banks in United Kingdom.

PRIVATE BANK - TALENT MANAGEMENT & DIVERSITY

Awarded To: A private bank demonstrating superior talent acquisition, diversity of approach, training support and management.

PRIVATE BANK - BEST CREDIT PROVIDER

Awarded To: A private bank that provides credit for family office, UHNW and HNW clients.

PRIVATE BANK - CUSTOMER FACING DIGITAL CAPABILITIES (BANKING)

Awarded To: A private bank that demonstrates superior client facing digital capabilities in banking through mobile apps or online banking delivered in conjunction with advisors.

PRIVATE BANK - CUSTOMER FACING DIGITAL CAPABILITIES (INVESTMENTS)

Awarded To: A private bank/wealth manager that demonstrates superior client facing capabilities in investment management through mobile apps or online investment management. This can cover investment ideas, objectives, portfolio construction, simulation, alerting and rebalancing services that are delivered in conjunction with advisors.

INVESTMENT MANAGEMENT CATEGORIES

SPECIALIST INVESTMENT MANAGER WITH ASSETS UNDER MANAGEMENT UP TO £2 BILLION *

Awarded To: An organisation that provides specialist investment services to help clients manage their wealth.

SPECIALIST INVESTMENT MANAGER WITH ASSETS UNDER MANAGEMENT BETWEEN £2-5 BILLION *

Awarded To: An organisation that provides specialist investment services to help clients manage their wealth.

SPECIALIST INVESTMENT MANAGER WITH ASSETS UNDER MANAGEMENT OVER £5 BILLION *

Awarded To: An organisation that provides specialist investment services to help clients manage their wealth.

Categories & Criteria

SPECIALIST WEALTH MANAGER WITH ASSETS UNDER MANAGEMENT UP TO £2 BILLION *

Awarded To: An organisation that provides specialist wealth management services to help clients manage their wealth.

SPECIALIST WEALTH MANAGER WITH ASSETS UNDER MANAGEMENT BETWEEN £2-5 BILLION *

Awarded To: An organisation that provides specialist wealth management services to help clients manage their wealth.

SPECIALIST WEALTH MANAGER WITH ASSETS UNDER MANAGEMENT OVER £5 BILLION*

Awarded To: An organisation that provides specialist wealth management services to help clients manage their wealth.

INVESTMENT CONSULTANCY

Awarded To: An organisation providing investment consultancy services to help clients manage their wealth.

PRIVATE INVESTMENT OFFICE

Awarded To: An independent organisation that focuses on broad multi-asset investment strategies and portfolios.

MULTI FAMILY OFFICE UP TO £1 BILLION ASSETS UNDER MANAGEMENT *

Awarded To: An organisation that supports families to manage their wealth and that provides a range of services covering family advice, investments, tax, estate planning etc.

MULTI FAMILY OFFICE BETWEEN £2-3 BILLION ASSETS UNDER MANAGEMENT *

Awarded To: An organisation that supports families to manage their wealth and that provides a range of services covering family advice, investments, tax, estate planning etc.

MULTI FAMILY OFFICE OVER £3 BILLION ASSETS UNDER MANAGEMENT *

Awarded To: An organisation that supports families to manage their wealth and that provides a range of services covering family advice, investments, tax, estate planning etc.

FUND MANAGER

Awarded To: A provider of collective investments for wealthy clients.

INVESTMENT PRODUCT PROVIDER

Awarded To: A investment manager based in Europe whose products are available to private clients within Europe.

ALTERNATIVE INVESTMENT MANAGER (BANK/INSTITUTIONAL) *

Awarded To: A bank or institute based in Europe whose alternative investments are available to private clients within Europe.

ALTERNATIVE INVESTMENT MANAGER (INDEPENDENT) *

Awarded To: An independent manager based in Europe whose alternative investments are available to private clients within Europe.

EXTERNAL ASSET MANAGEMENT PLATFORM & OFFERING

Awarded To: An organisation providing a platform and exceptional support for external asset managers.

PLATFORM PROVIDER

Awarded To: A provider of tools, strategies, model portfolios and access to investment products for the wealth management community.

ETF PROVIDER

Awarded To: A fund/asset manager that makes exchange-traded products available for wealth management clients.

FX SOLUTION PROVIDER

Awarded To: A provider of foreign exchange services to wealth management organisations or clients.

STRUCTURED PRODUCT PROVIDER *

Awarded To: A wealth manager or service provider providing an exceptional structured product or range of products or support services.

MOST INNOVATIVE THEMATIC PROPOSITION *

Awarded To: A provider offering an innovative thematic proposition.

DISCRETIONARY FUND MANAGEMENT (DFM) OFFERING *

Awarded To: A provider with a leading discretionary fund management offering to clients.

PRIVATE CLIENT CATEGORIES

PRIVATE CLIENT LAW FIRM

Awarded To: A law firm team or barrister dedicated to private client issues.

OFFSHORE LAW FIRM

Awarded To: An offshore-based law firm.

PRIVATE CLIENT LAWYER

Awarded To: An individual lawyer dedicated to private client issues.

Categories & Criteria

FAMILY LAW LEGAL TEAM

Awarded To: A law firm or practice dedicated to the practice of Family Law for clients.

PENSIONS ADVISOR OF THE YEAR

Awarded To: A firm or individual who offers financial advice in the field of pensions, structuring and investment advice.

TAX TEAM

Awarded To: A team in a professional services firm specialising in advising on the tax affairs of private clients.

ACCOUNTANCY TEAM

Awarded To: A team in an accountancy firm specialising in reporting, transacting or wealth structuring for private clients.

INDEPENDENT TRUST OR FIDUCIARY TEAM

Awarded To: A trust company team that is independent of a larger non-trust business.

INSTITUTIONAL TRUST OR FIDUCIARY TEAM

Awarded To: A team within a trust company or a team offering fiduciary services to the wealth management market.

ESTATE PLANNING

Awarded To: An organisation that provides estate planning advice to private clients.

MANAGEMENT CONSULTANCY

Awarded To: An individual or firm that provides consultancy services to wealth management organisations and/or family offices.

WEALTH PLANNING

Awarded To: A private client organisation; trust firm, law firm and any other organisation performing wealth planning services.

WEALTH MANAGEMENT TECHNOLOGY CATEGORIES (VENDORS)

OVERALL FRONT OFFICE SOLUTION PROVIDER

Awarded To: A technology company that provides an integrated solution that includes a combination of onboarding, CRM, client reporting, client risk profiling, portfolio management, client facing digital solutions including mobile apps.

TRANSACTION PROCESSING SOLUTION

Awarded To: A technology provider that offers straight through processing and core banking.

PORTFOLIO MANAGEMENT

Awarded To: A technology solution provider specialising in tools for managing clients' investment portfolios and monitoring against mandate.

CLIENT COMMUNICATIONS

Awarded To: A technology solution provider specialising in tools for wealth managers to communicate with clients including companies monitoring and record-keeping (that may or may not relate to social media).

CLIENT REPORTING

Awarded To: A technology solution provider specialising in tools for wealth managers to report performance and other data to clients.

COMPLIANCE

Awarded To: A technology provider specialising in solutions and tools to help compliance, AML and KYC.

CRM SYSTEM

Awarded To: A provider of client relationship management systems for wealth managers.

CLIENT LIFECYCLE MANAGEMENT SOLUTION

Awarded To: A technology provider offering a solution that manages the client relationship from the on-boarding process through the entire client lifecycle.

DATA PROVIDER

Awarded To: A technology vendor providing financial data to private banks and other wealth managers.

CLIENT ACCOUNTING

Awarded To: A technology vendor that excels in providing an accounting solution for private client wealth.

SUITABILITY PRODUCT

Awarded To: A provider of a technology solution to help wealth managers assess and document the investment risk appetite of clients.

RISK MANAGEMENT

Awarded To: A technology solution provider specialising in tools for wealth managers to manage non portfolio risk.

ON-BOARDING

Awarded To: A technology solution to help wealth managers bring new clients into their organisation.

INNOVATIVE CLIENT SOLUTION B2B

Awarded To: An institution that has developed innovative products and services for their clients as part of a solutions-focused service model.

Categories & Criteria

INNOVATIVE CLIENT SOLUTION B2C

Awarded To: An institution that has developed innovative products and services for their clients as part of a solutions-focused service model.

CHANGE MANAGEMENT PROCESS/BEST IMPLEMENTATION OF A TECHNOLOGY SOLUTION

Awarded To: A technology vendor or their clients that has successfully implemented multi-functional change programmes to significantly improve client experience and performance. Open also to clients of technology companies.

INNOVATIVE WEALTHTECH SOLUTION B2B

Awarded To: A technology business that has an innovative wealth management offering.

INNOVATIVE WEALTHTECH SOLUTION B2C

Awarded To: A technology business that has an innovative wealth management offering.

INNOVATIVE USE OF ARTIFICIAL INTELLIGENCE

Awarded To: A technology company servicing the wealth management industry.

BEST TECHNOLOGY OUTSOURCING SOLUTION

Awarded To: Third-party organisations providing business processes or systems to wealth management businesses.

ROBO-ADVISORY SOLUTION *

Awarded To: A platform that provides Robo advice to private clients.

CHIEF TECHNOLOGY OFFICER *

Awarded To: The CTO of any technology organisation in the wealth management industry.

CHIEF EXECUTIVE OFFICER * (NEW)

Awarded To: The CEO of any technology organisation in the wealth management industry.

WEALTH MANAGEMENT TECHNOLOGY CATEGORIES (IN- HOUSE)

INNOVATIVE CLIENT SOLUTION

Awarded To: An institution that has developed innovative products and services for their clients as part of a solutions-focused service model.

CHANGE MANAGEMENT PROCESS/BEST IMPLEMENTATION OF A TECHNOLOGY SOLUTION

Awarded To: A bank, wealth manager or their client who have successfully implemented multi-functional change programmes to significantly improve client experience and performance.

MOST EFFECTIVE ON-BOARDING PROCEDURE BY A WEALTH MANAGEMENT FIRM

Awarded To: A business that has excelled in their on-boarding procedure.

INNOVATIVE USE OF ARTIFICIAL INTELLIGENCE

Awarded To: Any organisation involved in the wealth management industry.

SPECIALIST WEALTH MANAGEMENT CATEGORIES

MARKETING OR PR CAMPAIGN (ONLINE, PRINT, BRAND LAUNCH/RELAUNCH)

Awarded To: A wealth manager or other private client practitioner that has used online or print channels to promote their services to private clients or to raise their profile either within the industry or to clients. Open also to PR companies.

CYBER SECURITY

Awarded To: A firm providing services or products aimed at averting a cyber security breach or handling the aftermath of such an event targeting a wealth management firm, family office, family business or a HNW individual. Firms in this category include specialist consultants, technology providers, forensic specialists, insurance providers and law firms.

CORPORATE SOCIAL RESPONSIBILITY

Awarded To: An organisation with a good record in being a worthy corporate citizen.

DIVERSITY AND INCLUSION IN WEALTH MANAGEMENT (COMPANY)

Awarded To: A wealth organisation committed to diversity and inclusion in the workplace.

WEALTH MANAGEMENT EXECUTIVE SEARCH FIRM (EUROPE)

Awarded To: An executive search firm based in Europe (branch or HQ) with a focus or specialist team covering wealth management in Europe.

INTERNATIONAL FINANCE CENTRE

Awarded To: An IFC based in any country that is actively promoting itself in Europe markets.

Categories & Criteria



GLOBAL CUSTODIAN TO A PRIVATE CLIENT BUSINESS

Awarded To: A custodian offering services to private client business.

PHILANTHROPY OFFERING/INITIATIVE OF THE YEAR

Awarded To: An organisation that has excelled in the provision of a philanthropy advice or execution, or a charitable initiative.

MOST PROMISING NEW ENTRANT

Awarded To: An established or new entrant that has entered a new market, client segment or product and service area.

MOST INNOVATIVE WEALTH MANAGEMENT MODEL

Awarded To: An established or new entrant that has provided an innovative approach that is a first of a kind and new to the industry.

MOST PROMISING MERGER

Awarded To: An institution that seeks to obtain synergies from the combined organisation that delivers enhanced value to clients.

M&A ADVISOR

Awarded To: A corporate finance and deals provider that has both expertise in the wealth sector and has demonstrated expertise in the mergers and acquisitions space.

EXCELLENCE IN SERVICING NORTH AMERICAN CLIENTS

(Sponsored by *Family Wealth Report* the sister publication of *WealthBriefing* covering wealth management news within the North American market.)

Awarded To: An institution offering the best service to European-based North American clients.

ESG

Awarded To: An organisation with an outstanding ESG proposition and offering.

LEADERSHIP AND INDIVIDUAL BASED CATEGORIES

LEADING INDIVIDUAL (BANKER)

Awarded To: An individual working within a bank. Age and experience is no bar but something special should mark out this individual working in the private client world.

LEADING INDIVIDUAL (ADVISOR)

Awarded To: A private client advisor. Age and experience is no bar but something special should mark out this individual.

OUTSTANDING CONTRIBUTION TO WEALTH MANAGEMENT THOUGHT LEADERSHIP (INDIVIDUAL)

Awarded To: A wealth manager that has made an outstanding contribution to thought leadership in wealth management.

OUTSTANDING CONTRIBUTION TO WEALTH MANAGEMENT THOUGHT LEADERSHIP (COMPANY)

Awarded To: An organisation that has made an outstanding contribution to thought leadership in wealth management.

WOMEN IN WEALTH MANAGEMENT (INDIVIDUAL CONTRIBUTION)

Awarded To: A woman in private banking or wealth management who is an inspiration both to clients and colleagues.

WOMEN IN WEALTH MANAGEMENT (COMPANY CONTRIBUTION)

Awarded To: Wealth management organisations that demonstrate support for women in their career development.

DIVERSITY IN WEALTH MANAGEMENT (COMPANY)

Awarded To: A wealth management organisation committed to diversity in the workplace.

CHIEF EXECUTIVE OFFICER

Awarded To: The CEO of any organisation in the wealth management industry.

CHIEF INVESTMENT OFFICER

Awarded To: The CIO of any organisation in the wealth management industry.

CHIEF OPERATING OFFICER

Awarded To: The COO of any organisation in the wealth management industry.

RISING STAR UNDER 30

Awarded To: An individual working in the wealth management industry.

RISING STAR UNDER 40

Awarded To: An individual working in the wealth management industry.

LIFETIME ACHIEVEMENT

Awarded To: A wealth manager that has made an outstanding and long-standing contribution to wealth management.

Why Sponsor?

These prestigious awards recognise excellence within the wealth management and family office industry.

In addition they provide your business with a highly affluent, captive audience of private bankers, lawyers, accountants, financial advisors and technology providers across the wealth management sector.

Consequently these awards present your business with a unique opportunity to be involved in industry sector sponsorship giving your company the following:

- Exposure across our subscription base and associated international media (over 60,000 subscribers worldwide).

- Extensive brand exposure at the gala dinner to over 300 of Europe's leading wealth management professionals.
- The opportunity to target an affluent market with high disposable income.
- Excellent networking opportunities with senior decision-makers.
- Association with leading industry awards.
- The chance to develop new contacts and expand your sales network.
- Increased brand exposure within the wealth management sector generally and specifically access to a unique wealth management community through editorial name-checks on the *WealthBriefing* news wire, and social media postings.

FOR SPONSORSHIP OPPORTUNITIES CONTACT:

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Partners who support our global awards



Sponsorship Opportunities

SPONSORSHIP BENEFITS	HEADLINE	AWARD CATEGORY	DRINKS RECEPTION	WINE
Verbal acknowledgement from awards host	✓	✓	✓	✓
Guest invite for gala celebration	10	5	5	5
Branding on awards backdrop	✓	✓	✓	✓
Logo in awards programme	✓	✓	✓	✓
Full-page colour advertisement in awards programme	✓	✓	✓	✓
300-word profile in awards programme	✓	✓	✓	✓
Web banner on main awards event website with link	✓	✓	✓	✓
Opportunity to make welcome speech from main awards podium	✓			
Name associated with an award category	✓	✓		
Opportunity to present award to category winner	✓	✓		
Opportunity to present 3 key awards	✓			
Logo on table plan	✓			
Interview with the Editor	✓	✓		
Branding in the drinks reception area on photo booth backdrop	✓	✓	✓	✓
Professionally Produced Video	✓	✓	✓	✓
	£12,500	£7,500	£7,500	£7,500

Global Awards



2021/2022 Announcements Schedule

NOVEMBER 2021

WealthBriefing MENA Awards

FEBRUARY 2022

WealthBriefing Swiss Awards
WealthTechAmericas Awards

MARCH 2022

WealthBriefing Swiss EAM Awards
WealthBriefing European Awards

APRIL 2022

WealthBriefingAsia Greater China Awards

MAY 2022

Family Wealth Report Awards
WealthForGood Awards

JUNE 2022

WealthBriefingAsia Awards

SEPTEMBER 2022

WealthTechAsia Awards



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www.wealthbriefing.com / www.wealthbriefingasia.com / www.fwreport.com

About *WealthBriefing* (the supporting publication for the Awards)

WealthBriefing is the leading subscription-based business intelligence service for the wealth management community, with the latest news, analysis and in-depth features from around the globe.

Subscribers are part of an international network for whom staying abreast of the latest industry developments is a crucial part of their professional lives.

Members of the network find our content on topics such as wealth strategy and planning, industry M&A, evolving business models in the light of technological innovations, important people moves, investment management trends and asset allocation techniques to be an essential resource in a fast-moving world.

Our global editorial team is dedicated to providing subscribers with exclusive news and insight, meaning that *WealthBriefing* readers are often the first to see the headline news affecting their industry.

Nowhere else can wealth managers access such a breadth and depth of business intelligence covering this sector.