HONG KONG
APRIL 2022

The Seventh Annual WealthBriefingAsia Greater China Awards for Private Banking Excellence

INFORMATION PACK
Introduction

The focus of the Seventh Annual WealthBriefingAsia Greater China Awards for Private Banking Excellence 2022, part of the global awards programme at WealthBriefingAsia, is to recognise outstanding performance, both domestic and international.

Winning a WealthBriefingAsia Award sets organisations and individuals apart from their peers and is a tangible demonstration that they have something special to offer.

Sponsors will also be invited to contribute to the post awards Acclaim Magazine and have an interview with Group Editor, Tom Burroughes along with a professionally produced video.

Key dates for the diary:

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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</thead>
<tbody>
<tr>
<td>Nominations open</td>
<td>12 October 2021</td>
</tr>
<tr>
<td>Submission deadline</td>
<td>11 February 2022 (midnight)</td>
</tr>
<tr>
<td>Finalists &amp; Winners Notification</td>
<td>23 February 2022</td>
</tr>
<tr>
<td>PUBLIC ANNOUNCEMENT OF THE WINNERS</td>
<td>7 April 2022</td>
</tr>
</tbody>
</table>
## Award Categories

### PRIVATE BANKING CATEGORIES

**OVERALL REGIONAL PRIVATE BANK**
Awarded To: A private bank in the Greater China region; open to domestic and international banks.

**CREDIT PROVIDER**
Awarded to: A private bank provider of credit facilities in the Greater China market.

**PURE PLAY BOUTIQUE PRIVATE BANK**
Awarded To: A pure play private bank operating in the Greater China region.

**WEALTH PLANNING TEAM**
Awarded To: A wealth planning team in a private bank in the Greater China region.

**ALTERNATIVES PROVIDER**
Awarded To: A private bank alternatives provider in the Greater China region.

**NRI OFFERING BY A PRIVATE BANK**
Awarded To: Best non-resident Indian offering by a private bank in the Greater China region.

**PHILANTHROPY SERVICES**
Awarded To: A philanthropy offering by a private bank in the Greater China region.

**SRI OFFERING**
Awarded To: A socially responsible investing offering by a private bank in the Greater China region.

### DISCRETIONARY PORTFOLIO MANAGEMENT OFFERING
Awarded To: A discretionary portfolio management offering from a private bank in the Greater China region.

### DIGITAL PLATFORM
Awarded To: A digital platform from a private bank in the Greater China region.

### PRIVATE EQUITY PROVIDER
Awarded To: A provider of private equity advice and services in the Greater China region.

### IMPACT INVESTING
Awarded To: A private bank provider of impact investing advice and services.

### CLIENT EXPERIENCE
Awarded To: A client experience provided by a private bank in the Greater China region.

### PRIVATE BANKING REGIONAL PARTNERSHIP
Awarded To: An international private banking regional partnership within the Greater China region.

### REGIONAL GROWTH STRATEGY AND IMPLEMENTATION
Awarded To: A private banking growth and expansion strategy and implementation within the Greater China region.

### WEALTH MANAGEMENT CLIENT ONBOARDING INITIATIVE
Awarded To: An initiative to onboard clients by a wealth manager within the Greater China region.

### PRIVATE BANK EMPLOYER OR TALENT MANAGEMENT INITIATIVE
Awarded To: A private bank that has demonstrated its ability to attract and retain its private banking employees through a combination of skillful recruitment or talent management within Greater China.

### PRIVATE BANKING CHARITIES TEAM
Awarded To: A private banking team offering charities advisory within Greater China.

### FIXED INCOME OFFERING
Awarded To: A wealth manager with fixed income advice, offering or analysis in Greater China.

### PRIVATE BANK FOR FAMILY GOVERNANCE SERVICES
Awarded To: A provider of advisory services relating specifically to family governance within Greater China (open to banks only).

### NEXT-GEN PROGRAMME
Awarded To: A provider of advisory services or range of programmes relating specifically to the management of next generation (next-gen) family wealth within Greater China (open to banks only).

### FAMILY WEALTH ADVISORY OFFERING
Awarded To: A non-bank provider of advisory specific or general services relating to the management of family (or SFO) wealth or within Greater China (open to Trusts/Lawyers/Consultancies).

### GOVERNANCE SERVICE FOR FAMILIES
Awarded To: A non-banking provider of advisory services relating specifically to family (or SFO) governance within Greater China (open to Trusts/Lawyers/Consultancies).
Award Categories

(Available for individual sponsorship)

BEST PRIVATE BANKING ESG OFFERING
Awarded To: A private bank offering the best demonstrable environmental, social and governance (ESG) policy within the Greater China region.

EXTERNAL ASSET MANAGER (EAM) SERVICE PROVIDER
Awarded To: A bank platform provided to the external asset manager or multi family office market in Greater China.

UHNW TEAM
Awarded To: A team that looks after clients with over USD 30 million with the bank.

HNW TEAM
Awarded To: A team that looks after clients with under USD 30 million with the bank.

SPECIALIST CATEGORIES (GREAT CHINA)

WEALTH MANAGER FOR GREATER CHINA FAMILIES
Awarded To: A offering specifically for UHNW families or single family offices (SFO) in the Greater China Region (open to banks or other wealth managers and advisors).

EXCELLENCE IN SERVICING NORTH AMERICAN CLIENTS
(SUPPORTED BY FAMILY WEALTH REPORT)
This award is sponsored by Family Wealth Report the sister publication of WealthBriefingAsia covering wealth management news within the American market. Awarded To: An institution offering the best service to Greater China-based North American Clients.

INSURANCE PRODUCT OR OFFERING FOR UHNW FAMILIES
Awarded To: A provider of insurance advice or products to UHNW families in the Greater China region.

DIVERSITY IN WEALTH MANAGEMENT
Awarded To: A wealth manager who has demonstrably furthered diversity in its operation in the Greater China region.

WEALTH MANAGEMENT MARKET ENTRANT
Awarded To: A new firm offering wealth management services or advice within the Greater China region.

REAL ESTATE ADVISORY SERVICES
Awarded To: A wealth manager offering advice about international real estate investments or offering facilitation services to clients within Greater China.

MULTI FAMILY OFFICE (MFO) SERVICE PROVIDER
Awarded To: A provider of platform or advisory services to Multi-family Offices (MFO) within Greater China (open to banks only).

WEALTH MANAGEMENT M&A DEAL
Awarded To: A merger and/ or acquisition deal between wealth managers in the Greater China region.

INTERNATIONAL FINANCE CENTRE
Awarded to: A standout IFC operating within the Greater China region.

INDEPENDENT WEALTH MANAGER
Awarded To: An organisation which demonstrably client focussed, offers an exceptional range of services within Greater China.

ESG
Awarded To: An organisation with an outstanding ESG proposition and offering.
<table>
<thead>
<tr>
<th>Award Categories</th>
<th>INDIVIDUAL AWARDS</th>
<th>CHIEF OPERATING OFFICER</th>
<th>CHIEF EXECUTIVE OFFICER</th>
</tr>
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<tbody>
<tr>
<td>PRIVATE BANKING INDIVIDUAL COUNTRY CATEGORIES</td>
<td></td>
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<tr>
<td>HONG KONG DOMESTIC PRIVATE BANK</td>
<td>Awarded To: A private bank serving the Hong Kong domestic market.</td>
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<tr>
<td>HONG KONG INTERNATIONAL PRIVATE BANK</td>
<td>Awarded To: A private bank serving the Hong Kong international market.</td>
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<tr>
<td>TAIWAN MARKET PRIVATE BANK</td>
<td>Awarded To: A private bank serving the Taiwan market.</td>
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<tr>
<td>HONG-KONG EXTERNAL ASSET MANAGER (EAM) SERVICE PROVIDER</td>
<td>Awarded To: A bank platform provided to the external asset manager or multi family office market in Hong-Kong.</td>
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<td></td>
<td>WEALTH MANAGEMENT RISING STAR UNDER 30</td>
<td>Awarded To: An exceptional business leader in an private bank in Greater China.</td>
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<td></td>
<td>Awarded To: A standout wealth manager who despite their age, has in the opinion of their employer demonstrated an ability to perform at a high level, maintain values and operate within the high standard demanded by their employer within the Greater China region.</td>
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<td></td>
<td>WEALTH MANAGEMENT RISING STAR UNDER 40</td>
<td></td>
<td>Awarded To: An exceptional operational leader in an private bank in Greater China.</td>
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<tr>
<td></td>
<td>Awarded To: A standout wealth manager who has in the opinion of their employer, demonstrated an ability to perform at a high level, maintain values and operate within the high standards demanded by their employer within the Greater China region.</td>
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<td></td>
<td>WOMAN OF THE YEAR IN GREATER CHINA WEALTH MANAGEMENT</td>
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<td></td>
<td>Awarded To: A standout female family office or private banking executive who has demonstrated an ability to perform at the highest level, maintain industry values and excelled within the Greater China region.</td>
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<td></td>
<td>LIFETIME ACHIEVEMENT</td>
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<td></td>
<td>Awarded To: A senior executive from around the region to recognise their work over a number of years.</td>
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<td></td>
<td>OUTSTANDING INDIVIDUAL</td>
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<tr>
<td></td>
<td>Awarded To: A senior wealth management executive from around the region to recognise their work during the year.</td>
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Why Sponsor?

Benefits

To enhance the independence and credibility of these awards, sponsorship is only open to businesses not competing for these awards. These prestigious awards recognise excellence within the wealth management and private banking industry. In addition they provide your business with a highly affluent, captive audience of private bankers, lawyers, accountants and financial advisors 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 (60,000 subscribers worldwide).
• Extensive brand exposure on the night to over 150 of Hong Kong’s leading private banking, C-level executives and guests.
• 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.

Media

All sponsors will receive coverage in WealthBriefingAsia and also feature in the awards program, together with other media listed as follows:

• WealthBriefing
• Family Wealth Report

FOR SPONSORSHIP OPPORTUNITIES CONTACT:
ANDREW DEANE
Business Development Director - WealthBriefingAsia
UK Mobile: +44 7957 782290
WhatsApp: +44 7852 996907
andrew.deane@clearviewpublishing.com
## Sponsorship Opportunities

<table>
<thead>
<tr>
<th>SPONSORSHIP BENEFITS</th>
<th>HEADLINE</th>
<th>AWARD CATEGORY</th>
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</thead>
<tbody>
<tr>
<td>Verbal acknowledgement from awards host</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Guest invite for gala celebration</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Branding on awards backdrop</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Logo in awards programme</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Full-page colour advertisement in awards programme</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>300-word profile in awards programme</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Web banner on main awards event website with link</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Opportunity to make welcome speech from main awards podium</td>
<td>✓</td>
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</tr>
<tr>
<td>Name associated with an award category</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Opportunity to present award to category winner</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Opportunity to present 3 key awards</td>
<td>✓</td>
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<tr>
<td>Logo on table plan</td>
<td>✓</td>
<td></td>
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<tr>
<td>Interview with the Editor</td>
<td>✓</td>
<td></td>
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<tr>
<td>Branding in the drinks reception area (to be approved by the organiser)</td>
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<td>✓</td>
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<tr>
<td>Professionally Produced Video</td>
<td>✓</td>
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**US $20,000** | **US $7,500**
Acclaim: WealthBriefingAsia’s Exclusive Awards Record of Achievement

These awards publications have been created to maximise the marketing potential for successful firms to tell their most critical markets of their achievements.
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.