



ACCLAIM

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

EXCLUSIVE
WINNERS OF THE
WEALTHTECHASIA
AWARDS 2021



October 2021

Futureproof and advance your business with embedded compliance

Apiax, a business enablement solution for global financial institutions of all sizes.

Apiax provides business leaders in financial institutions with instant, dependable answers to their most pressing regulatory questions right where they need it: in their existing systems, tools and processes. We leverage the expertise of the world's most trustful law and consulting firms. Apiax allows business units to do more business across more jurisdictions, reduce costs and mitigate risks.

How we create value for wealth managers globally



Serve more clients

Retrieve regulatory requirements across jurisdictions at the click of a button.



Offer added value

Provide tailored services and advise in the most highly regulated products.



Book more meetings

Realise more client meetings with easy access to regulatory restrictions.



Reduce risks

Understand the do's and don'ts to avoid regulatory and reputational risks.

Find out more

www.apiax.com

Get in touch

hello@apiax.com



FOREWORD

Tom Burroughes, Group Editor, *WealthBriefingAsia*

The *WealthTechAsia* Awards shine a bright light on the firms that have set the pace in applying technology to the busy wealth management arena in Asia. They are held to salute outstanding practitioners in the field, and the service qualities, innovations and solutions these players bring to the market.

Technology is so much a part of the wealth industry today, whether it touches on front-office work or back-, and middle-office functions. It affects compliance, managing the client experience, tracking liquidity events and monitoring how well investors' portfolios perform. Such activity deserves its own specific awards programme and we are delighted to honour the businesses that excel in these fields.

The awards are a great opportunity for the winners to showcase their achievements, explain more about what they do, and use their accolades as marketing and business development tools. We know from past experience how closely contested these awards are and how highly entrants value the chance of emerging victorious. They also give the editorial team at *WealthBriefingAsia* a chance to further understand the movers and shakers in the industry, deepen our contacts and widen our knowledge.

As editor, I also know how valuable the programme has been in engaging with the industry and getting closer to its concerns.

CONTENTS

INTERVIEWS:

Avaloq	5
Contemi Solutions	7
CREALOGIX	9
ERI	11
FactSet	13
FundCount	15
IMTF	17
InvestCloud	19
Julius Baer	21
Kaizen Reporting	23
Klarity Risk/Finvent	25
Lakshey Gangwani	27
Moonfare	29
NICE Actimize Financial Markets Compliance	31
TrustQuay	33
Valuefy	35
vestr	37
WIZE by TeamWork	39

WEALTHTECHASIA AWARDS

WINNERS IN FULL	41
-----------------------	----



OVERVIEW OF THE ASIAN WEALTH TECHNOLOGY SECTOR

Asia is home to about 15 million high net worth individuals, second only to North America and that number is expected to rise 39 per cent by 2024, according to KPMG. The cohort of mass-affluent consumers is also rising fast. The region boasts large domestic and locally rooted firms with a strong digital appeal. For example, Singapore-headquartered DBS has already made its digital approach a core part of its strategy, including private banking.

Why is this region digitally-savvy? It makes sense because many HNWI individuals are relatively young compared with those in other regions, and have made their fortunes in tech, among other sectors. They are also geographically dispersed in certain nations such as Malaysia and Indonesia – serving

clients in these countries is expensive to do with brick-and-mortar offices. Younger emerging nations such as Vietnam are well suited to newer channels, leapfrogging traditional models.

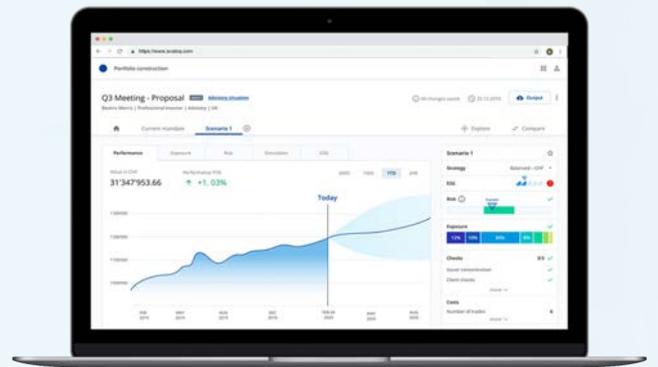
As already mentioned, local firms such as DBS, UOB, CMB and Bank of China are prominent; international banks such as HSBC, Citigroup, Standard Chartered and UBS have been vigorously rolling out digital offerings. WealthTech platforms and digitally-driven advisory solutions such as Welinvest, Lufax and AutoWealth have risen to prominence. So-called “Challenger Banks”, in their early days within Asia, have a big chance to go after HNWI and mass-affluent wallets. Names include Ant Group in China, Singapore's Grab and Tencent's WeChat Pay.

WealthTech is a broad term, and embraces a range of firms helping banks and other providers to advise, serve and support clients more efficiently, quickly and cheaply. Amidst all this ferment of activity, regulators such as the Monetary Authority of Singapore and Hong Kong's SFC are working hard to keep pace, ensuring that bad actors are weeded out without stifling healthy innovation.

Keeping abreast of all these new players and the trends at work isn't easy, but so far the picture appears to be exciting. Asia is often at the cutting edge. Half a decade ago when Credit Suisse launched its mobile private banking platform, it chose Asia and not native Switzerland, as its initial starting location.

In the new era, half of APAC investors consider a highly-personalized service to be a must-have

We agree – so we built Avaloq Wealth, your standalone digital solution for providing tailored, real-time client advice



Data source: Avaloq survey in Australia, China, Singapore, Hong Kong, Japan, and India; 2021



Learn more at avalog.com/avalog-wealth

avalog
An NEC Company

AVALOQ KEEPS CLIENTS AHEAD OF THE CURVE

Gery Dachlan, Managing Director, South Asia & Australia, **Avaloq**, talks to *WealthBriefingAsia* Group Editor **Tom Burroughes** on the firm's enduring success.

How is Avaloq positioned in the Asia-Pacific WealthTech market?

Avaloq is a global leader in digital banking solutions, core banking software and wealth management technology. More than 150 banks and wealth managers with more than \$4.5 trillion in assets managed worldwide currently place their trust in Avaloq. We have established a strong local presence with offices in Singapore, Hong Kong, Manila, Sydney and Pune.

Since end of 2020 we are part of NEC Corporation, the Japan-based leader in the integration of IT and network technologies. NEC's large global footprint will help us to strengthen our positioning in the region and to tap into new markets as we are leveraging the synergies between Avaloq and NEC.

What are you doing to stay on the front foot?

Avaloq ensures that our clients are always ahead of the curve. Over the next five years, there will be a huge generational shift in global wealth management. We are seeing this change happening now in Asia, with many large portfolios being transferred from the baby boomers to the younger generation, as investor needs and expectations are evolving.

As we are aiming to democratise wealth management, automating processes to increase efficiencies and enhancing the digital customer experience will be critical to achieving this aim. Technology can enable wealth management products to be offered in a more scalable manner, helping a larger portion of the population to reach their financial goals.

How has your business and business model reacted to the pandemic?

COVID-19 has highlighted the capabilities and future potential of digital and

cloud-based operating platforms. The crisis has reinforced the importance of stable digital systems that can function seamlessly and enable people to work remotely. It is during unexpected events that modern IT infrastructures and as-a-service delivery models prove their true value.

Horizontal scalability brought by cloud-native, containerized applications allows organisations to flexibly handle spiking transaction volumes. Our business has therefore seen a rise in demand for as-a-service models accelerated by the need for secure and invisible banking, as well as by the need to deliver banking services in a resilient and efficient way.

What lessons have been learnt that can be carried forward?

The digital revolution has inspired investors to be more involved in their investments. This was one of the key findings in our most recent **study** which looks at the fundamentals of investor behaviour across Asia and Europe. In Asia, Avaloq found that investors are generally more aggressive in their risk-taking approach.

Furthermore, robo-advisory is prominent in Asia, with investors in China, Hong Kong and Singapore leading the way. However, while robo-advisory can improve customer service, investors still appreciate the human element. Finding the right balance between human interaction and digitally based support for clients is the challenge banks face.

What are prospects for wealth management in the future?

The democratisation of wealth management will allow more people in Asia to have access to a greater quantity and quality of investment strategies and advice that was once reserved for ultra and high net worth individuals only. This takes into account the importance of ESG, not just as an

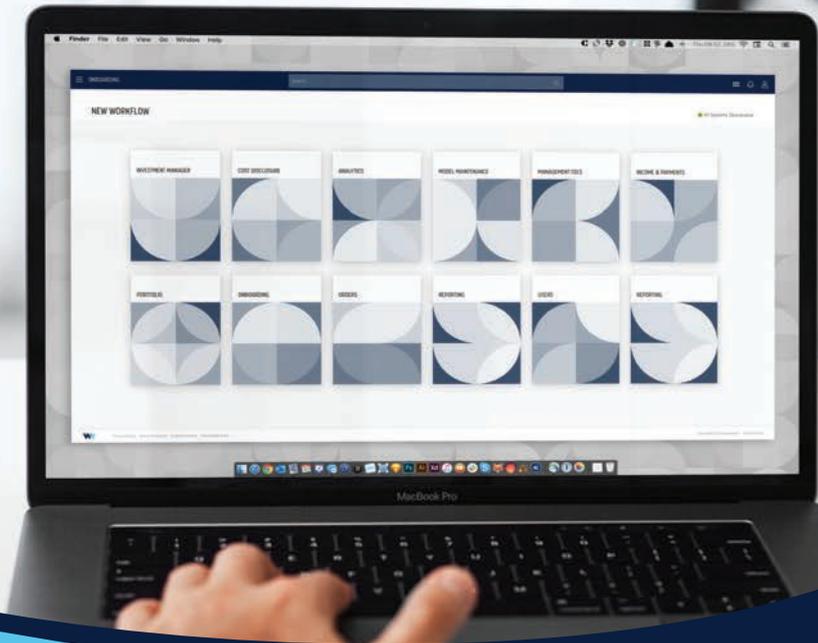
investment trend, but opening up access to investment opportunities to all classes of investors. There are very few providers that can automate the entire process chain from end customer to adviser, all the way to core settlement. However, Avaloq does this and powers digital transformation in the wealth management sector through fully integrated software. ■



Gery Dachlan
Managing Director, South Asia & Australia, Avaloq



CONTEMI



Helping You Win Clients Meet Their Investment Goals And Your Business Goals

Digital Wealth Management Platform



For more, visit www.contemi.com or email info@contemi.com

Singapore. Hong Kong. Malaysia. Vietnam. Indonesia. UK. Norway. India. Australia

DELIVERING GREAT CLIENT EXPERIENCES IN UNSETTLING TIMES

Tom Burroughes, Group Editor at *WealthBriefingAsia*, talks Gaurav Mehta, Executive Director, Head of Sales, **Contemi Solutions**.

What has particularly marked you out for success in this category?

In the last year, more than ever, when investors needed timely access to information and, and wealth managers needed integrated and real-time information, analytics and digital communication tools to service their clients in the remote working environment, Contemi's client portal and on-boarding helped advisors seamlessly on-board new clients, enhance client relationships and better manage their practices.

In response to the challenges that wealth managers and financial advisors faced whilst trying to effectively communicate with their clients during the COVID-19 lockdown, Contemi quickly designed and launched a Lite version of existing Client Portal, a light touch, secure communication channel for smallest organisations to better communicate with their customers.

One of Contemi's clients more than doubled its number of investors using our Client Portal which placed so much emphasis on omni-channel, intuitive user experience and on customization for clients and advisors.

With restricted travel and in-person meetings, implementing our digital on-boarding and client communication tools proved to be quick wins for our clients' long-term digital strategy.

What sets you apart from your peers this year?

Digital customer communication and engagement dominated the agendas of Wealth Management firms over the last one year and we remained committed to ensure that WM firms have access to the tools to meet their agendas.

What we hear from our customers is that our solutions provided them considerable assistance to during a time that experienced high volumes of activity.

What are you going to do to stay on the front foot in a fast-growing but also challenging region such as this?

At Contemi, we are committed to make the wealth management journey seamless for everyone involved, and our Wealth Intelligence (WIN) suite makes it possible with its front, middle and back-office tools.

We will continue to innovate our solutions, with a key focus on empowering Investment Managers to take informative decisions, and RM's to deliver a truly omni-channel personalised customer experience, with our award-winning analytics, client portal and reporting, portfolio management and client lifecycle management solutions.

In Asia, we have a presence in Singapore, Malaysia, Hong Kong, Indonesia, Vietnam, India and this is growing. We have significantly extended our team this year to focus on increasing market share within the region.

We are investing heavily into R&D across our solutions portfolio to ensure client needs are met in an ever-changing marketplace. And these awards are testament to our focus on continually developing our solutions to meet and exceed client and market requirements.

What are the prospects for wealth management in the future bearing in mind a new social and economic environment ahead?

The changing social and economic landscape requires wealth management firms to take a unified approach to transformation, including reinventing the customer experience, reimagining data flows across the organization, and integrating technology into investment decision-making and product capabilities.

The ability to forge trust and create hyper-personalised customer experiences at scale will be new key core competency, where cloud and AI will play a huge role.

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

Winning the *Best Client Communication and On-boarding Solutions* award in the region, endorses the excellence that we are achieving in this area as a leading technology solutions provider to the financial services industry. As well as it is certainly a strong encouragement for us to know we are heading in the right direction in a highly competitive market.

We hope it will help us highlight the relevance of the digital on-boarding and client communication, and help wealth management firms, in their evaluation, that seek to work with a trusted partner for their technology needs. In a virtual world, trust is more than ever the key component of doing business in our space. ■



Accelerate your digital banking initiatives with us

A powerful combination of experience and innovative technology enables CREALOGIX to fast-track your digital transformation

CREALOGIX is a publicly-listed, **global leader in digital banking technology** and a Swiss Fintech 100 company. For 25 years we have partnered with some of the world's leading banks and wealth management firms.

We are a digital financial engagement platform provider, independent from legacy and core banking systems. We deliver a modern, unified, omnichannel front end to financial institutions for their client-facing products and services in banking and wealth management.



Email us at solutions@crealogix.com



Find out more on our website crealogix.com



MEETING AND BEATING THE CHALLENGE OF ASIA-PACIFIC EXPANSION AT CREALOGIX

Karsten Kemna, Managing Director for Asia-Pacific, at **CREALOGIX**, talks to *WealthBriefingAsia* about how it has pushed standards to the fore this year.

CREALOGIX is a publicly-listed, global leader in digital banking technology. For 25 years we have partnered with some of the world's leading banks and wealth management firms, providing them with a modern, unified, omnichannel front end for their client-facing products and services in banking and wealth management.

With an extensive client base and our broad, state-of-the-art product offering, we can give our clients a competitive edge, help them grow client business and ensure that digital channels deliver on their promise of driving new and exciting initiatives.

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

In the last year CREALOGIX recognised the APAC region as a strategic growth market. We continue to drive expansion in the region and have recently entered the Australian market. With our 25 years' experience and a strong and unique offering, we are meeting the demands of banks and their end customers for digitalisation with a comprehensive, personalised user experience.

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

CREALOGIX has invested in strengthening our organisation. In just one year the number of local employees has tripled, and the strengthening of our local workforce is set to continue in order to help our clients innovate. The award we have received marks the high quality of our compelling front-end solutions, as well as our open architecture.

What are you doing to do to stay on the front foot in a fast-growing but also challenging region such as this?

We have a very motivated and highly skilled team from nine different countries. Our open architecture and APIs provide the digital foundation to help banks stay ahead of the competition. The secure, fully tested solutions are scalable and make

it easy to add new features and solutions that address the latest requirements including Conversational AI, hybrid advisory, digital onboarding, ESG and Islamic Banking. Our solutions demonstrate the value of our global reach and experience, where for example our experience in the Middle East, including implementations with tier one banks in Saudi Arabia, allow us to bring innovative and Sharia-compliant solutions to markets such as Indonesia and Malaysia.

How has your business and business model reacted to the pandemic?

With travel still being challenging between countries, we bring more local capabilities into the countries we serve in this region. Our intention is to broaden and leverage our partner networks in several countries (e.g. Sedania in Malaysia).

What lessons have been learnt that can be carried forward?

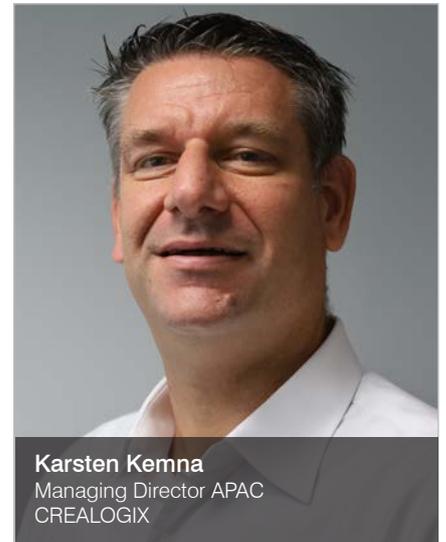
We have all learned how important digital channels are to keep us connected. We expect this recognition to continue as people start to demand more and more digital solutions from financial services organisations.

Have your differentiators become more important to your business?

In this rapidly changing market, our experience and trusted solutions will become even more important. We provide the tools to allow financial institutions to implement and scale new, easy-to-use digital tools rapidly to keep up with demand.

What do you hope will be the result of receiving this accolade?

As winner in the category Australasia and a finalist in PanAsia, we would obviously like to capitalise on this initial success. We see this as a launchpad for our future goals in the region where we intend to provide financial institutions with the leading-edge front-end solutions. We know they need to enhance their interactions with clients online and grow their businesses as a result. ■



Karsten Kemna
Managing Director APAC
CREALOGIX

“THE AWARD WE HAVE RECEIVED MARKS THE **HIGH** QUALITY OF OUR **COMPELLING** FRONT-END SOLUTIONS, AS WELL AS OUR **OPEN** ARCHITECTURE.”



EMBRACING FINTECH



ADAPTABLE TEAM, FLAT STRUCTURE AND FLEXIBLE PRODUCT IS A WINNING FORMULA

Nicholas Hacking, Director of Sales at **ERI**, talks to *WealthBriefingAsia* Group Editor Tom Burroughs.

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

With the health situation globally that we have all faced during the last year and a half, it is perhaps more challenging to see what sets any vendor apart from its peers. However, many of the values and strengths characterising ERI have come even more to the fore in the last months. Our flat structure, highly adaptable team and extremely flexible product allow us to be more responsive and closer to our customers than some of our peers, and therefore more agile and reactive.

How has your business and the business model reacted to the pandemic?

Our team's adaptability has been successfully tested by the many months of variable restrictions, and our customers have expressed their satisfaction with how quickly ERI has adapted to the situation.

Moreover, the OLYMPIC Banking System's flexibility has come into its own by responding to the changing requirements of our clients. Despite the rather different ways of working internally, with remote working among other changes, we maintained our investment in moving our solution forward both technically and functionally. We continued to move implementation projects to completion, to add further functionality to our product, and to constantly support our customers.

Considering this context, my response to this question is that we have further enhanced our resilience in terms of working, we have shown that we can manage to move projects, developments and the product forward without physical meetings, but that the model otherwise has not changed that dramatically. We have been doing that for years, so in that sense the model hasn't changed; the change, albeit significant in and of itself, is just in the ways of communicating and collaborating.

What are the prospects for wealth management in the future bearing in mind a new social and economic environment ahead?

The business environment has always been one that changes. Business adapts to society and the environment in which business exchange takes place. The difference has been the exponential speed of change.

While initially private banking and wealth management operations could have been accused of evolving perhaps more slowly than other areas, I don't believe that that allegation can be so easily levelled at the sector today, especially in Asia. Clearly there are still many areas of the sector which need to change further, or perhaps increase the speed at which they change, but I think that across the sector we have seen, and will still see, significant transformation.

In part this has been driven by what has been happening in other sectors, but at the end of the day it's business reacting to what its customers are asking for, combined with the competition factor. Competition, and the fact that ideas and examples are flowing across the globe more easily, means that financial organisations are under pressure to adapt to changed revenue flows, which in turn means that business models and processes need to evolve. This then creates significant opportunities for technology to assist, which is of course supported by the amazing rate at which various fintechs have emerged in the last few years. This in turn has meant that there is an even stronger need for suppliers like ourselves to work with the best fintech organisations to deliver as holistic an experience as possible.

As such, I believe the future is different but still bright. As we know, there will be a very significant flow of wealth from one generation to another in the coming years, not just in the US and Europe but also in Asia, so we will see HNWI's being created both from economic activity and from inheritance, but in each case with very different,

and in many cases very fluid, expectations in terms of both service and supporting technology compared to the expectations of even just 10 years ago. ■



Nicholas Hacking
Director of Sales
ERI

“BUSINESS ADAPTS TO SOCIETY AND THE ENVIRONMENT IN WHICH BUSINESS EXCHANGE TAKES PLACE.”

Connected Data + Sophisticated Analytics to Meet Your Clients' Goals

To meet your clients' demands for transparency and personalized information you need an all-in-one solution that combines integrated global data, multi-asset class research, robust portfolio analytics, and dynamic reporting tools. With FactSet, you gain the actionable intelligence you need to succeed as a wealth manager in today's market.



FactSet.com/Wealth



FACTSET'S OPEN, FLEXIBLE TECHNOLOGY HELPS MANAGERS PROVE THEIR WORTH

Tom Burroughes, Group Editor, *WealthBriefingAsia*, talks to **Goran Skoko**, Head of Research and Wealth Solutions, at **FactSet**, on how the firm has been ahead of its rivals.

FactSet delivers superior content, analytics, and flexible technology to help more than 155,000 users see and seize opportunity sooner. FactSet helps wealth managers demonstrate their value to clients while protecting and growing their assets with all-in-one wealth management software that combines portfolio analytics, multi-asset class research, global data, and reporting tools as well as the building blocks to create custom, digital client experiences.

FactSet's open and flexible technology allows wealth managers to consume data in a variety of ways, including via comprehensive data feeds, a configurable mobile and desktop platform, digital portals, APIs, and more. More than half of our organisation is dedicated to data integrity and concordance. We not only collect over 30 of our own datasets, but also work with many third-party data providers to provide our users with a robust offering. We harmonise and link data so users can seamlessly leverage a variety of sources within our workstation and in their models and systems.

FactSet continues to invest in data quality and the collection and integration of additional datasets to help wealth managers uncover the unique and actionable insights they need to reduce risk, operate more efficiently, comply with local regulations, and create a competitive edge to win and retain business.

FactSet has focused our innovations and strategic investments to expanding our breadth of content - both collected by FactSet and integrated from third parties - to provide support for our clients' most sophisticated investment strategies.

Examples of recent enhancements and partnerships include:

- FactSet acquired Truvalue Labs to augment our ESG offering. Truvalue leverages complex algorithms to sift through millions of data points to uncover ESG information hidden in unstructured, third-party data (e.g.,

articles, social media, and filings) from 100,000+ sources. The results provide actionable information on how companies are complying to the SASB and UN SDGs frameworks, and behaving pertaining to issues like carbon emissions, labour relations, data security, and more.

- Expansion of news and filings sources including the addition of: EDINET Japan documents, Logmi Japanese transcripts, Shenzhen Stock Exchange content, SCRIPTS Asia, Nikkei Asia Headlines, and CNINFO Company Announcements.
- The Open:FactSet Marketplace, an online ecosystem leveraging our symbology to connect our data with carefully screened third-party providers, currently features 145+ core and alternative data feeds. Many of these datasets are also integrated into our workstation, giving on-platform users a more robust offering.
- FactSet and PingAn Insurance (Group) Company of China, Ltd. announced a joint offering for investors considering ESG metrics for companies incorporated in China. The offering will be launched by FactSet and Ping An's associate company OneConnect Financial Technology Co., Ltd., a leading technology-as-a-service platform for financial institutions in China. FactSet will integrate OneConnect's AI-driven ESG content sets into its workstations, standard data feeds, and APIs to accelerate the availability of ESG metrics for over 3,500 Chinese class A-share companies.
- FactSet and Smartplus, a leading Japanese wealth management and insurance platform, announced the integration of FactSet's ESG content into Smartplus' platform for retail clients. This integration will help Smartplus become the first robo-advisor investment platform in Japan that allows individual investors to consider ESG factors when selecting stocks. ■



Goran Skoko
Head of Research and Wealth Solutions,
FactSet

“FACTSET DELIVERS SUPERIOR CONTENT, ANALYTICS, AND FLEXIBLE TECHNOLOGY TO HELP MORE THAN 155,000 USERS SEE AND SEIZE OPPORTUNITY SOONER.”





WE GO BEYOND The Numbers

At FundCount, we do more than just track numbers. Our powerful accounting and investment analysis software delivers accuracy, operational efficiency and insight to family office professionals worldwide. All on a single integrated platform.

- Account for virtually all investment types and account structures
- Gain insight into nested entities
- Download and consolidate data from custodians automatically
- Minimize operational risk with automated workflow, reconciliation and compliance tools
- Create customized reports in minutes, not days or weeks

FundCount

For more information, visit www.fundcount.com or call +44 (0)7507-641-036

BRINGING SERVICES TOGETHER FOR A UNIFIED OFFERING AT FUNDCOUNT

Ashley Whittaker, President, Global Sales at **FundCount**, talks to *WealthBriefingAsia's* Group Editor, **Tom Burroughes**, about the reasons behind his firm's success.

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

FundCount is a leading provider of accounting and investment analysis solutions for family offices, which represent a major sector for us. As the heart of a firm's financial ecosystem, FundCount brings together portfolio and partnership accounting, a general ledger and reporting in one unified system.

FundCount supports all account structures, security types and transactions as well as offers automated workflow and compliance tools. A full suite of data integration tools enables FundCount to automate many mundane data management and other daily tasks. This multi-function approach on a single unified and integrated platform gives us an ongoing advantage over our single-function peers.

What are you going to do to stay on the front foot in a fast-growing but also challenging region such as this?

The growing wealth in Asia, which is outpacing that of other regions, has fueled an increase in family offices and the subsequent need for purpose-built accounting solutions. Modern wealth management solutions must be able to provide the framework for sound governance and more transparency amidst greater complexity.

FundCount is a global organization with five offices and clients around the world. To meet the challenges of Asia and other markets, FundCount continues to enrich its core accounting and investment management offering as well as introduce new technical and commercial innovations.

For example, FundCount launched the AppUniverse, a collection of APIs and pre-built integrations with popular industry apps such as customer relationship management (CRM) systems, and business intelligence tools such as Power BI and Tableau. The AppUniverse allows complex functions to instantly become part of FundCount's accounting and analytics, providing a truly comprehensive accounting solution.

Another new development is an end-to-end encryption communication tool that promises to revolutionize the world of client portals. Whether in terms of client reporting, two-way client communication or data integration and management from brokers, custodians, and alternatives managers for end users, this tool promises to make our clients' work faster and easier.

On the commercial side, we introduced a new pricing structure that scales with client needs. Additionally, a more focused approach to reducing procurement and implementation risk will make clients' procurement processes shorter and less costly.

What have been the challenges you have had to overcome to reach such a standard?

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.

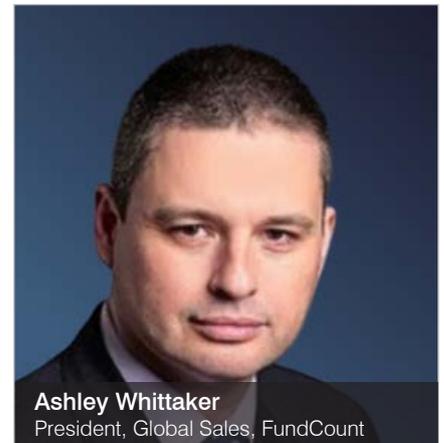
Wealth management structures can be incredibly intricate with various investments and layers of ownership, making it particularly difficult to track and aggregate data across multiple entities and generations. FundCount is flexible, so it can accommodate the unique structure of each family office. It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

Have your differentiators become more important to your business? Are they still relevant?

Today's family office requires accounting systems that can quickly and accurately process diverse and often complex assets

that are increasingly global. Systems must be able to take in data from disparate siloed sources and across numerous investment types and structures.

Purpose-built accounting systems like FundCount are uniquely positioned to meet these challenges. FundCount's differentiators - a unified platform for accounting, general ledger and reporting, and pricing that scales with client needs - are not only still relevant, but are increasingly important to family offices and therefore critical to the ongoing success of FundCount. ■





REGTECH PLATFORM

Modular Platform to Manage Risk & Compliance

One stop for all your regulatory needs

Our world-class software modules are quick to configure and integrate with your existing systems seamlessly. They are based on modern technology, advanced machine learning and algorithms to make your life more efficient. Our local teams provide you with solid know-how and accompany you throughout the entire project.

Learn more:
www.imtf.com



Excellence in RegTech Solutions

IMTF Banking Software Pte. Ltd. | Level 6 Republic Plaza 1 | 9 Raffles Place | Singapore 048619 | Phone + 65 6 735 6150 | info@imtf.com

A TARGETED APPROACH TO MANAGING ANTI-FRAUD, COMPLIANCE TASKS

Mark Büsser, Chairman of **IMTF**, talks to *WealthBriefingAsia* Group Editor **Tom Burroughes** on how this firm has pushed forward best practice in its sector.

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

IMTF RegTech platform offers a modular approach to manage Fraud and Compliance, both with respect to needs covered as well as costs. It is unique as it addresses the growing requirements of banks seeking more and more for capabilities that can support the convergence of compliance and anti-fraud technologies.

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

IMTF approach is a team approach, combining technological capabilities with project management skills as well as an in-depth knowledge and experience of the banking software industry.

What are going to do to stay on the front foot?

The growing number of broad references using multiple modules of our platform and the communication within the banking community will be a key element of IMTF's success in a region and an industry where word-of-mouth contributes more than anything else to building trust.

What have been the challenges you have had to overcome?

Our main challenge has been to overcome the reluctance of large local banks despite a highly innovative approach and a solid architecture without similar references in APAC. We have worked hard to change this perception and gain the trust of key players in the region.

How has your business and business model reacted to the pandemic?

We have been forced to react by initially working completely remotely and devising how the highest level of confidentiality could be conveyed from our experts to the banking stakeholders. Some of it will remain as it turned out to be more efficient for a globally operating organization like IMTF.

Have your differentiators become more important to your business?

The importance of our key differentiators has even increased with the challenges of the pandemic, and as mentioned above will contribute beneficially to our continued growth in the region.

Has morale amongst your colleagues held up well during the pandemic?

We are working hard to take care of our employees during this difficult time. So far we've been able to maintain morale throughout the organization with more frequent and regular online meetings to facilitate information sharing and informal communication that usually occurs during face-to-face interactions in the office. We have also opened dedicated time slots with the management team, where employees can ask questions and share concerns with us. We take it as a challenge to live our values to fight financial crime, even when conditions are not ideal. Our teams have been exemplary in this regard.

What are the prospects for wealth management in the future bearing in mind a new social and economic environment ahead?

The combination of new methods of communicating with customers as well as the increased customer interest in very specific and differentiated financial products has generated additional opportunities for our company.

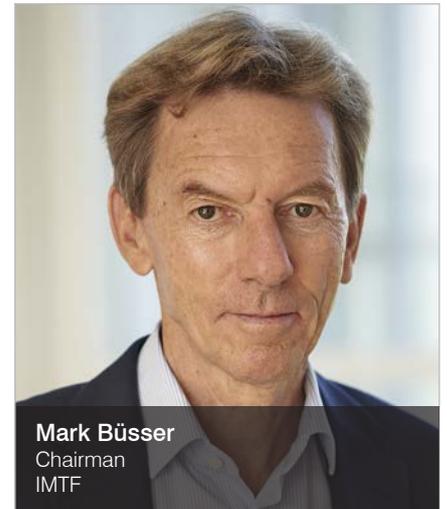
Whom do you look to for inspiration and ideas?

First and foremost, our customers. We listen, ask, iterate, test, and celebrate with our customers - because that is what drives us and our solutions.

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

These 4 awards illustrate very much our approach to digital efficiency and

compliance: our RegTech platform is unique in that it allows you to start with any use case and add modules as your requirements for convergence of compliance and anti-fraud technologies are growing. This recognition helps our customers to see that they are working with the best application of the latest technology, and thus helps increase the aforementioned "word of mouth", positively reinforcing our reputation and recognition of IMTF as a key player in the field. ■



Welcome to Digital.

We are InvestCloud – global leader in cloud-based, digital financial solutions. We create beautifully designed client experiences and intuitive operations solutions using an ever-expanding library of digital modular apps. The result? Powerful products for individual investors and institutions alike, assembled on-demand to meet clients’ specific needs.



InvestCloud is proud to be a 2021 WealthBriefing Asia Award winner.



HELPING CLIENTS BUILD FINANCIAL SOLUTIONS ACROSS THE WORLD AT INVESTCLOUD

Damien Piper, Head of Sales Asia, **InvestCloud**, talks to **Tom Burroughes**, *WealthBriefingAsia* Group Editor, on the firm's onward push for success.

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

InvestCloud is a global company specialising in digital platforms that enable the development of financial solutions, pre-integrated into the Cloud. We offer on-demand client experiences and intuitive operations solutions using an ever-expanding library of modular apps, resulting in powerful products that likewise can be highly personalised.

Besides functional excellence of its many apps, InvestCloud has three primary differentiators from other technology companies:

1. A Digital Warehouse with a mature, comprehensive and ever-expanding data model, pre-integrated into over 1,000 data sources, ensuring a single version of the integrated truth.
2. An AI-powered code generator called Programs Writing Programs (PWP), which enables business analysts and designers to create apps around the digital warehouse, each doing the work of 50 programmers.
3. The application of behavioural science to enable the rapid deployment, measurement and constant optimisation of digital experiences on the platform.

In February 2021, the merger of Finantix and Tegra118 into a global FinTech firm InvestCloud was announced. Through this strategic merger, InvestCloud has extended its global Software-as-a-Service (SaaS) wealth solutions platform, with over 20 offices around the world supporting over \$4 trillion of assets for more than 500 direct clients and hundreds more indirectly – including some of the biggest banks in the world. Our scalable approach to differentiated technology and global reach have no equal.

In APAC, we have clients who use our solution in 20 countries, multi-language, multi-currency with empathic personas thanks to our patented front-end technology which allows us to create over 7,000 personas with ease.

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

Innovation and dedication to quality are two of the pillars of our culture. Whether

on site or remotely, our teams have continued to operate seamlessly and flexibly to provide a truly global platform with a design-led mentality that allows clients to truly differentiate themselves.

Even through the last 15 months of worldwide uncertainty, our dedication to putting clients first has seen our global, cross-functional teams continue to deliver massive value for the hundreds of firms we serve and millions of users relying on InvestCloud platforms every day. We have not only continued to grow our client base, but also significantly extended our award-winning, innovative product portfolio to further help address key pain points.

What are you going to do to stay on the front foot in a fast-growing but also challenging region such as this?

InvestCloud is a company dedicated to growth – we grew from six people in a Los Angeles garage to a 900-strong, global business worth nearly \$2.5 billion in just 10 years with a strong presence in APAC.

The keys to our success have always included focus, consistency and accountability across all functions. Equally, InvestCloud has much talent – people who are passionate, innovative and committed to providing excellent products and services to our clients. Additionally, it takes constant investment, and InvestCloud has consistently invested over 35% of gross revenues back into the product.

What have been the challenges you have had to overcome to reach such a standard? Has morale amongst your colleagues held up well during the pandemic? What have you done to bolster their spirits?

Bringing the various component parts of a global business together when everyone – including clients – is working remotely is a challenge for any business, but we have bested the challenge. Even before the pandemic, we were heavy users of video-conferencing technology. And we've always run strong internal communications programmes, such as our biweekly global Ingenuity programme to demonstrate our latest products. But we've added

additional office and team stand-ups, and virtual happy hours and clubs, to keep people engaged and morale high.

How has your business and business model reacted to the pandemic? Have you introduced new working practices that will endure?

Because InvestCloud has always been cloud native, remote client service has never been an issue for us. And equally our products have always supported first-class client communication, automation and management for the managers we work with, even when managers and clients are not physically with each other. The pandemic has only underscored the importance of these digital strategies. ■



Damien Piper
Head of Sales Asia
InvestCloud



WE ARE ONE PART HISTORY
AND ONE PART FUTURE.

WHAT CAN WE DO
FOR YOUR TOMORROW
TODAY?

juliusbaer.com

Julius Bär

3. März St.

Jul Bär Julius Bär



Julius Bär
YOUR WEALTH MANAGER

DIGITAL INNOVATION WITH A PURPOSE: DRIVING CHANGE AT JULIUS BAER

Rajesh Manwani, Head Markets and Wealth Management Solutions Asia Pacific, **Julius Baer**, talks to *WealthBriefingAsia* Group Editor **Tom Burroughes**.

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

At Julius Baer, we believe that it is paramount to leverage technology to innovate and constantly enhance how we serve and delight our clients. Julius Baer is injecting purpose into its digitalisation efforts, ensuring that our Front Office colleagues are empowered to harness opportunities in creating true value for our clients.

One of the biggest efforts in 2021 to achieve this objective is the rollout of our new sophisticated advisory platform in Asia called Digital Advisory Suite, or DiAS.

DiAS acts as a fully integrated solution, ensuring end-to-end advisory process: from proposal creation, to the execution of a trade. This involves integration with all order entry tools to ensure trading instructions are transmitted to the execution and booking systems seamlessly. The platform undertakes automated pre-trade suitability checks of trade orders, identifying the need for further client education where applicable. It is a unique system that is able to collate lots of client information and assess its impact on the advisory process including constant monitoring of portfolios' health against the defined set of monitoring criteria.

DiAS covers all product categories in its universe including equities, funds, bonds, structured products, derivatives and recommends investment ideas which match with client needs.

Since its rollout, DiAS has improved operational efficiencies and augmented the overall experience of our relationship managers. It is now used by more than 800 client-facing staff in Asia from relationship managers, investment advisors, to off-hours dealers.

Significant trade volume across various asset classes passes through the new advisory platform on a daily basis in Asia.

DiAS goes beyond all previous systems and it gives back significant time to our front colleagues so that they can position themselves as trusted advisors to clients and create long-lasting relationships.

To keep the platform simple and connected to our vast technology architecture, we needed a bespoke solution. This could not have been achieved by using an off-the-shelf product. We decided to do it ourselves. This was a change of culture. We had to on-board new people and different profiles. We started to work in an agile way.

This change in mind-set within Julius Baer is a big step to building an efficient workspace that offers faster and more innovative outcomes.

We have created within Julius Baer a FinTech and innovation entity which is able to take all of the business know-how, all of the banking know-how, all of the advisory know-how to create the best possible solution for advisors, but also ultimately for clients. ■



Rajesh Manwani
Head Markets and Wealth Management Solutions Asia Pacific, Julius Baer



“AT JULIUS BAER, WE BELIEVE THAT IT IS PARAMOUNT TO LEVERAGE TECHNOLOGY TO **INNOVATE** AND CONSTANTLY **ENHANCE** HOW WE SERVE AND **DELIGHT** OUR CLIENTS. JULIUS BAER IS INJECTING **PURPOSE** INTO ITS DIGITALISATION EFFORTS, ENSURING THAT OUR FRONT OFFICE COLLEAGUES ARE **EMPOWERED** TO HARNESS OPPORTUNITIES IN CREATING TRUE VALUE FOR OUR CLIENTS.”

For Regulatory Reporting Peace of Mind – Use the Experts

- ✔ Accuracy Testing
- ✔ Reference Data Testing
- ✔ Advanced Regulatory Reconciliation
- ✔ Control Framework

Kaizen’s Quality Assurance provides the controls wealth managers need to meet their regulatory obligations and manage their reporting risks.

Developed by former regulators and regulatory reporting industry professionals, our services combine regulatory expertise and advanced technology to act as a shield against reporting issues.

For a free healthcheck of your reporting or a conversation with one of our regulatory specialists, please contact: enquiries@kaizenreporting.com

www.kaizenreporting.com



RELENTLESS FOCUS ON QUALITY AT KAIZEN REPORTING

Ian Rennie, Managing Director, **Kaizen Reporting**, talks to Tom Burroughes, Group Editor, *WealthBriefingAsia*, on this firm's success and awards achievement.

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

Kaizen Reporting is a specialist regulatory reporting firm with a goal of transforming the quality of regulatory reporting data the world over. Our quality assurance testing is unique in checking every reportable record, giving firms a complete picture of the quality of their reporting.

As we expand our RegTech solutions to serve the wider compliance community, we have also broadened our scope of services to meet the needs of the wealth management industry in Asia this year. We have launched our Shareholding Disclosure Service, which automates shareholding disclosure monitoring and reporting.

In addition, we have launched Single Rulebook, which gives firms the ability to search, share and manage regulatory rules on one digital platform.

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

Kaizen was founded by regulatory reporting experts - former regulators and specialists within industry - to help firms manage their reporting risks. Our services combine this expertise and advanced technology. It requires a huge team effort across the organisation. When regulatory reporting rules came into force, it challenged our clients and Kaizen's founders aimed to develop solutions to help them.

What are going doing to stay on the front foot?

We are always looking to looking to enhance and adapt the services that we offer clients to help them fulfil their regulatory reporting obligations. We update our services to align them with changes to rules so Kaizen clients are always on the front foot with regulatory change.

In October 2021 the Monetary Authority of Singapore will implement the last phase for the reporting of OTC derivatives which will see FX, equity and commodity contracts extended to the buy-side.

How has your business and business model reacted to the pandemic?

Along with many other companies, Kaizen employees have had to work from home during the pandemic. Kaizen's IT function did a fantastic job to ensure that each individual could function in the same way as if he or she was in the office.

Furthermore, Kaizen has seized the opportunity to continue to grow and increase output during the pandemic period doubling the number of employees and increasing margins.

Kaizen has always valued its people and this became more important during this period. We introduced a number of social / people related initiatives over the last year to maintain a sense of purpose and motivation.

Have your differentiators become more important to your business?

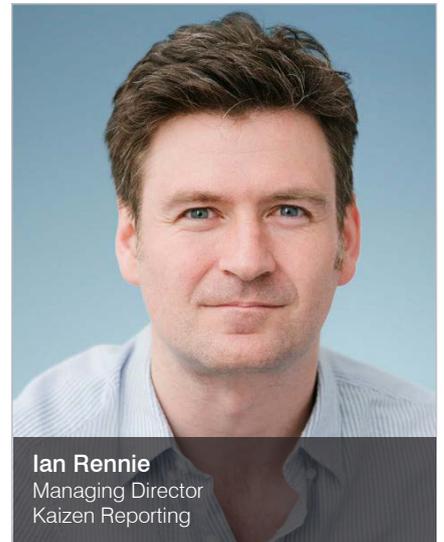
It's never been a better time for wealth management firms to get the right systems and controls in place as regulatory reporting is expected to get more challenging in the coming years in Asia and across the globe. Regulators are increasingly broadening the scope of firms that have to report under various trade and transaction reporting regimes and wealth managers are no exception.

Whom do you look to for inspiration?

Kaizen operates a relatively flat structure in order to foster a culture based on honesty, integrity and innovation. Kaizen has also always been dedicated to training young people both on the job and via our apprenticeship scheme. Our diverse staff base is our biggest inspiration.

What do you hope will be the result of receiving this accolade?

Now, we are turning our focus to Asia to help financial entities across the region with their reporting challenges and as a result, we are building our brand in Asia. We hope that winning such a prestigious award will further enhance our profile. ■



Ian Rennie
Managing Director
Kaizen Reporting

“KAIZEN OPERATES A RELATIVELY FLAT STRUCTURE IN ORDER TO FOSTER A CULTURE BASED ON **HONESTY, INTEGRITY AND INNOVATION**. OUR DIVERSE STAFF BASE IS OUR BIGGEST **INSPIRATION**.”



IF there were
no pandemics,
no geopolitical instabilities,
no economic recessions and
no financial market crises,
you would not need
a risk management system.

BUT such hazards do often
exist and **KlarityRisk** is a unique
solution that can help you
to effectively identify, measure
and mitigate your global
investment risks.

KlarityRisk

To discover more about us,
please visit www.klarityrisk.com,
or send your enquiries to info@klarityrisk.com



HELPING WEALTH MANAGERS STAY ON TOP OF RISKS

Makis Ioannou, CEO, **Klarity Risk/Finvent**, talks to **Tom Burroughes**, *WealthBriefingAsia* Group Editor, about the firm's accomplishments.

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

Finvent Software Solutions is a financial and risk analytics software and services provider, with over 20-years' experience in the sector, serving the Risk Modelling and Assessment workflows in the Asset Management, Private Wealth, Family Offices, Hedge Funds, Pension Funds space.

The KlarityRisk platform is a Market Risk Analytics and Stress-Testing platform which allows wealth and asset managers to utilize a comprehensive set of risk metrics and of scenario simulation methodologies, aiming to facilitate the control of their market-related risk exposures via the timely and continuous monitoring and reporting of their portfolio's investment risk.

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

Our core strength is our people and their ability to present solutions to real business problems. Our Risk experts strive to help clients thrive in the pursue of success and growth, as setting up new high procedures and protocols in circumstances like the COVID pandemic.

Having an extensive multi-decade exposure to the investment risk management industry, our team is committed to delivering excellent service and transfer of knowledge and innovation to our clients.

What are you going to do to stay on the front foot?

What we have always be doing: Continuously striving to provide robust and innovative Risk Management solutions and delivering the highest level of service to our clients' specific requirements.

We constantly learn and keep up with the fast-evolving investment industry, having the commitment to provide solutions that help a business become attractive to its own clients, trusted solutions.

What have been the challenges you have had to overcome?

We have realized the need to be proactive and able to provide holistic advice and the facilitation of customized reporting, with an aggregated performance/risk view of a portfolio.

The more case-specific information a manager obtains from a technology solution, the better informed the decision-making. This valuable feedback affects our plans for future software development and services delivery.

What lessons have been learnt?

Extreme market events are more frequent and violent than commonly thought of and their effect on portfolio performance should be diligently and continuously assessed.

Have your differentiators become more important to your business?

Our KlarityRisk platform has the ability to cover listed asset classes as well as a wide-range of alternative ones, including fund of funds, fund of hedge funds and private equity structures.

This allows our clients to track market risk management exposures and manage funds and individual strategies via a single system, thus dramatically reducing their total cost of ownership, while also managing more instrument and asset types using a single set of workflows.

Has morale amongst your colleagues held up well during the pandemic?

Although the pandemic has been a tough challenge, it has also instigated an internal process of durability and structural strength.

We have created a strong, internal supporting network to encourage our colleagues to maintain a high morale and strengthen the connections amongst the whole team.

What are the prospects for wealth management?

Wealth managers need to systematically improve their client acquisition process and increase their client satisfaction rate. Professional money managers should gradually build an offering not simply tied up to the last return data point on their reports, but transparently incorporating the investment process they follow and the risks they undertake.

What do you hope will be the result of receiving this accolade?

This accolade comes as a reward to our hard work, but also as a driving force to continually invest in enriching our existing solutions and develop new product enhancements. ■



Makis Ioannou
CEO, Klarity Risk/Finvent



Connecting the Client Journey: Why Onboarding Remains an Untapped Opportunity for Wealth Managers (in partnership with Fenergo)

The quality of wealth managers' client onboarding processes is increasingly recognised as a make-or-break factor in business growth and profitability, standing at the intersection of firms' most pressing compliance, cost-control and client experience concerns. This report stands as a global benchmark of onboarding processes across the global industry, as well as taking readers on a tour of the myriad ways industry leaders are leveraging new technologies.

External Asset Managers in Asia 2017 - New Directions for Rapidly-Expanding Sector (in partnership with UBS)

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

Family Office Focus: Efficiency in Accounting and Investment Analysis (in partnership with Family Wealth Report & FundCount)

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

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

Applying Artificial Intelligence in Wealth Management - Compelling Use Cases Across the Client Life Cycle (in partnership with Finantix & EY)

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

Global Compliance and Innovation Trends in Wealth Management (in partnership with Appway & Deloitte)

This cutting-edge report takes readers on a tour of key compliance and innovation developments in the EU, Switzerland, the UK, the US, Canada, Singapore and Hong Kong. This study is intended to help firms strike the fine balance between being prepared for the onslaught of regulatory changes coming up in their jurisdictions, while also staying ahead of the innovation curve.

Winning Women in Asia-Pacific (in partnership with VP Bank and Hywin Wealth)

Asia-Pacific's wealthy women represent a highly attractive target client group. Yet, they remain an

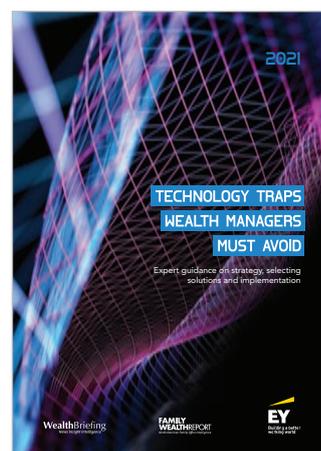
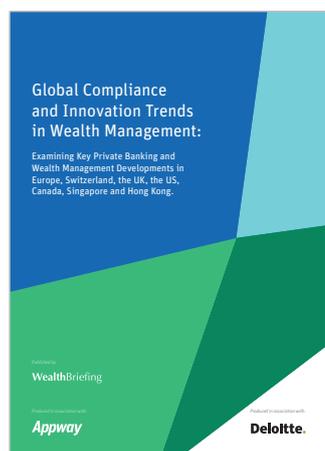
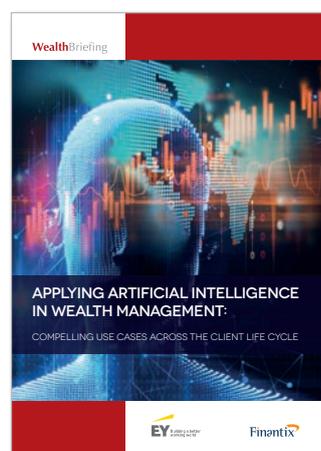
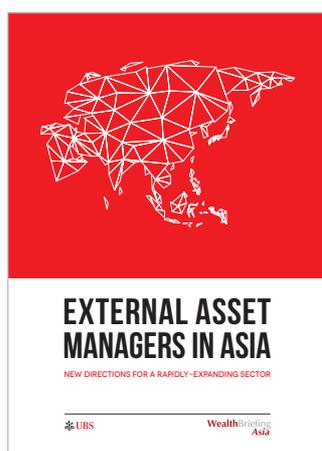
underserved one in many senses in spite of their growing financial power and pronounced need for professional advice. Our second report examining women's specific needs presents truly actionable insights drawn from interviews with H/UHNWIs and their advisors right across the region.

C-Suite Confidential - Ten Key Tech & Ops Trends for the Wealth Management Sector (in partnership with SS&C Advent)

This succinct yet wide-ranging report shines a light on both macro and micro trends, beginning with industry growth sentiment and ending on operating model evolution, taking in every key area of development in between. It brings together datapoints and candid comments from chief operating officers, chief technology officers and other senior executives globally to create an invaluable peer benchmarking tool.

Technology Traps Wealth Managers Must Avoid 2021 (in partnership with EY and leaders in wealth tech)

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



BENEFITS OF BUILDING WEALTH MANAGEMENT SOLUTIONS FROM SCRATCH

WealthBriefingAsia Group Editor **Tom Burroughes** talks to **Lakshey Gangwani**, a prominent figure in the Asia-Pacific wealth management industry, on how and why he reached his level.

What sets you apart from your peers this year?

In the first instance, allow me to thank you Tom, the team at *WealthBriefingAsia*, and the judging panel for this honour and recognition of my efforts and endeavours over the past year.

Second, in response to your question regarding what I believe sets me apart from my peers this year: in many respects, I have been very fortunate to have the opportunity to have built a wealth management solution for the industry from the ground up. As such, I have been entirely focused - with my team - on solving complex and costly challenges for the wealth management industry by building a solution that streamlined end to end workflows around idea sharing and information discovery between the frontline and the product desk, thereby helping improve frontline efficiency at a very critical time for the industry.

In developing the proposition, rather than take a one size fits all approach, I took the time and effort to ensure that I understood the wider industry landscape.

Let's dive deeper into your approach, and how it all came together?

On a more granular level, my approach was focused in four areas:

- 1) Defining the broader industry landscape;
- 2) Securing 360 feedback and engagement from industry stakeholders and end-clients;
- 3) Mapping the feedback to the landscape; and
- 4) Building a complete ecosystem involving various stakeholders and participants from the wider wealth management industry.

Once I had the feedback from different perspectives, the next step was to map the exact feedback in context of the landscape that was defined earlier.

As this step helped me develop a deep understanding of the landscape and the

challenges of different stakeholders. I could understand in depth what the business challenge was that needed to be resolved.

We could, for example, quickly understand if an RM is managing a really large number of clients (as is the case with mass affluent segment, so it's a productivity challenge) or if the RM is just not on the client's preferred communication platform.

As a result, I could map the challenges for each segment across the landscape starting right from the digital-only or retail segment all the way to family offices and external asset managers.

I could easily identify the friction points, not only within the wealth management entities, but also in the larger wealth management ecosystem.

And that brings us to the last step i.e. building an ecosystem. Once I had an understanding of the friction points within the wealth management industry, I started to bring in more stakeholders so that the wealth managers could have a single platform to seamlessly connect with a larger ecosystem.

What was the response from the industry and how challenging was it to get various stakeholders engaged?

As the proposition began to take shape, many of these early thought leaders also became our first customers/prospects/leads as they could see their own vision becoming an actual working solution.

So, very soon we had a community of thought leaders, who not only believed in the product, but also the ecosystem that I was building. There were so many instances, when one of these early thought leaders would convince others to join the ecosystem, even without me being involved or they would pitch them their own vision of how they planned to enhance the ecosystem further.

So, our thought leaders also became our evangelists. ■



Lakshey Gangwani

“ONCE I HAD AN **UNDERSTANDING** OF THE FRICTION POINTS WITHIN THE WEALTH MANAGEMENT INDUSTRY, I STARTED TO **BRING IN** MORE STAKEHOLDERS SO THAT THE WEALTH MANAGERS COULD HAVE A SINGLE PLATFORM TO SEAMLESSLY **CONNECT** WITH A LARGER ECOSYSTEM.”

Reach further



Extraordinary investors deserve extraordinary results. Moonfare provides access to expertly curated top-tier private equity funds with low commitments suited to individual investors. Start your journey today.

Learn more at moonfare.com

MOONFARE



GREAT AND VARIED FUNDS PROVE POTENT MENU OFFERING AT MOONFARE

Tom Burroughes, Group Editor of *WealthBriefingAsia*, talks to Yuri Narciss, Managing Director of **Moonfare**, a technology platform for investments, about how it has stood out from its peers.

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

Despite the global pandemic Moonfare has achieved record-breaking growth this year. We believe this comes down to a number of factors in terms of our marketing and product development, but mostly due to the fact that we have simply had some amazing funds on the platform spanning everything from buyout to distressed strategies, tech, growth equity and even healthcare.

How have your colleagues contributed towards success?

Moonfare is composed of several key teams, each one playing a crucial role in Moonfare's global success. At its core, Moonfare is a tech company that depends on a large team of engineers and developers to build and maintain our proprietary platform that our investors have come to love. Moonfare currently has over 140 staff globally including five in Hong Kong, 40 of which work in our tech team.

What are going to do to stay on the front foot?

We will continue to do what we do best: bring our investors only highly-vetted opportunities from top-tier fund managers. Less than five percent of the hundreds of opportunities we review each year make it to our platform. It's the quality of the funds that truly separate Moonfare from the rest.

We are also listening to our customers and improving the platform to make the entire process as simple as possible and we're bringing exclusive content and events to our investor community.

What have been the challenges you have had to overcome?

Keeping a solid pipeline of new and diverse strategies that meet our rigorous standards is obviously not easy. Our investment team is under a lot of pressure to deliver, but we have been very proud of

the results. To support this Moonfare have made some key hires, most recently bringing Chief Investment Officer Winson Ng to the team and Sweta Chattopadhyay as Investment Director.

What lessons have been learnt from the pandemic?

Don't panic. By staying true to our mission and listening to our customers we have been able to ride the storm and have had an extremely successful year. We have and always will be an agile organisation and this means we are able to react quickly when circumstances are changing. So when we couldn't do physical events any more due to the pandemic, we quickly shifted to online events.

Has morale amongst your colleagues held up well during the pandemic?

Surprisingly the morale has been very good. We find transparency to be key to this and that's why we are having regular all-staff meetings via Google Meet where our CEO and management team can not only transport the vision and targets but also answer questions to be sure everyone feels well-informed.

Whom do you look to for inspiration and ideas?

First and foremost we look at our client's needs and listen to their feedback in order to shape our platform. But as a company focused on innovation, we also look outside to our industry to discover new and better ways of doing things.

What do you hope will be the result of receiving this accolade?

By winning such a prestigious award we hope that potential investors will be further convinced that Moonfare is the leader in making private equity investments accessible to individuals and by having an office in Hong Kong and a team of highly professional locals they will be convinced we are here to stay. ■



Yuri Narciss
Managing Director, Moonfare

"BY WINNING SUCH A **PRESTIGIOUS** AWARD WE HOPE THAT **POTENTIAL** INVESTORS WILL BE FURTHER **CONVINCED** THAT MOONFARE IS THE LEADER IN MAKING PRIVATE EQUITY INVESTMENTS **ACCESSIBLE** TO INDIVIDUALS."

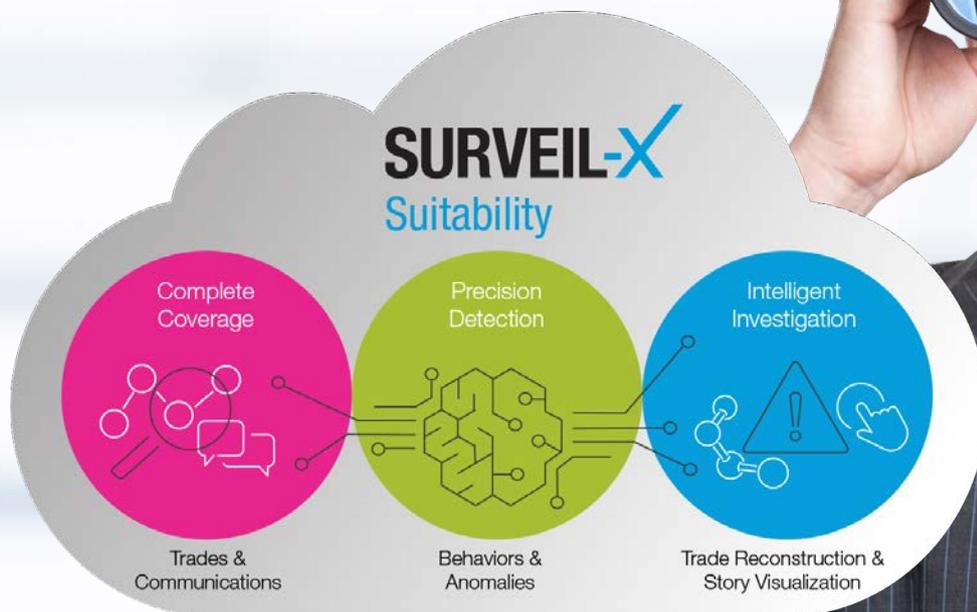


SURVEIL-X

Suitability

The First AI-Powered True Holistic Conduct Surveillance Suite

- Multi-Dimensional Analytics Using Trades & Communications
- Monitor Advisor Disclosures and Recommendations
- Discovers Previously Unknown Risk
- Cloud Agility and Cost Savings
- Provides Full Global Regulatory Coverage



NICE ACTIMIZE STRENGTHENS SUITABILITY ACROSS ASIA

Lee Garf, General Manager, **NICE Actimize Financial Markets Compliance**, talks to *WealthBriefingAsia* about its achievements and future plans.

NICE Actimize, winners of this year's WealthTechAsia "Best Suitability Technology Provider, Pan-Asia" award, recently released SURVEIL-X Suitability for Wealth and Insurance, a comprehensive AI-powered surveillance and suitability solution that builds on the capabilities of its industry-leading SURVEIL-X Holistic Conduct Surveillance suite.

A growing body of global regulations and recommendations is exerting pressure on financial services organisations to more closely monitor regulated employees; review their investment recommendations, transactions and accounts for suitability - and ensure that required disclosures are being properly communicated, making a strong surveillance and supervision solution a necessity.

Within APAC, the Monetary Authority of Singapore's Private Banking Sales and Advisory Practices guidance, as well as the Securities and Futures Commission's and Hong Kong Monetary Authority's suitability obligations, are among those regulations that have elevated the importance of a strong surveillance and supervision strategy for financial services organizations. Consistent controls and processes, along with sophisticated analytics, are among the capabilities offered by NICE Actimize in its surveillance solutions that help firms address sales practices and investment suitability requirements.

"As we continue to grow our commitment to the Asian market, we are seeing widespread adoption for our surveillance solutions. As wealth management firms rapidly adapt more digital channels to engage with their customers, NICE Actimize's advancements in surveillance helps make this transformation easier," Lee Garf, General Manager, NICE Actimize Financial Markets Compliance, said. "With our solution, firms can meet their obligations to regulators while managing advisor-client risks on a more holistic level to encourage a better culture of conduct, all while building a robust bullet-proof compliance programme."

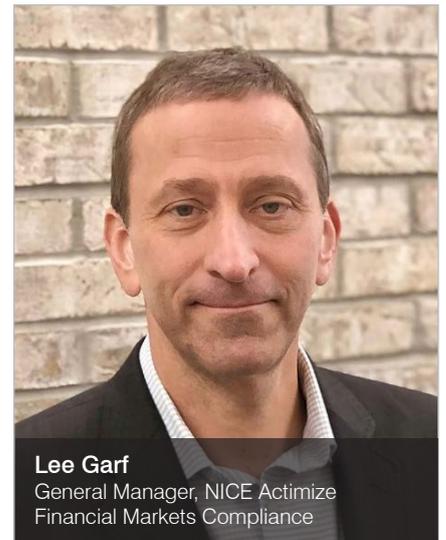
NICE Actimize's Sales Practices & Suitability solution provides a built-in broker risk dashboard for an intuitive and instant view of risk posed by individual brokers. By automating oversight and supervision, firms can ensure consistency and maintain a consolidated audit trail, lowering regulatory risk while improving productivity and efficiency. Automated alert generation, reporting, and audit documentation eliminate manual look-ups and increase staff efficiency, generating high-quality alerts with fewer false positives while creating more consistent processes across the enterprise using fewer resources. Comprehensive audit trails, reporting tools, and hierarchical organizational views increase oversight and transparency, ensuring brokers advise clients with suitable investment recommendations, enhancing client satisfaction, and mitigating the risks of litigation, regulatory penalties, and reputational damage.

Leveraging advanced AI and natural language processing, NICE Actimize's Sales Practices & Suitability solution can detect advisor's changing behaviours, by establish a profile of normal behaviour (for example, for a specific regulated user or group of monitored employees), related to communications and transactions. By pairing this with NICE Actimize's Managed Analytics Service ActimizeWatch Compliance, profiles for individual advisors and groups of advisors, and for accounts, may be created.

"Future-thinking firms are shifting from a reactive approach to surveillance, to a more proactive approach, driven by the technology that is available now," explains Garf. "By offering a holistic view of the advisor and by leveraging AI and NLP, firms now have the opportunity to predict when issues could up, and take preventive measures faster. This will help protect end investors from harmful sales practices, and protect firms from regulatory fines, reputational damage."

As the 2021 Suitability Winner, NICE Actimize has successfully applied cloud, artificial intelligence and advanced

analytics to address the wealth management market segment's critical needs. Already adopted by a number of leading global financial services organisations, SURVEIL-X Suitability with its combination of communications surveillance and sales practices & suitability surveillance will continue to provide benefits to the Asian wealth management community. ■



Lee Garf
General Manager, NICE Actimize
Financial Markets Compliance



TrustQuay

Your trusted software partner for digitalisation



**Private Client and
Trust Administration**

Corporate Services

**Alternative Fund
Administration**

trustquay.com



A COMPETITIVE BLEND OF CAPABILITIES AT TRUSTQUAY

Keith Hale, Executive Chairman at **TrustQuay**, talks to *WealthBriefingAsia's* Group Editor, **Tom Burroughes**, on how this firm has hit the award-winning heights.

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

What has continued to set TrustQuay apart this year is the competitive advantage we have in terms of product range, modern technology stack, global coverage and targeted R&D spending. We have the necessary scale and structure to deliver changing needs of corporate services, trust and fund administration providers.

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

The team at TrustQuay is one of our greatest strengths and the driver of success across our company.

What are you going to do to stay on the front foot?

An example is our recent launch of the first fully automated and integrated onboarding solution specifically designed and developed for the corporate services and trust administration market, that includes built-in ID verification.

As part of a major new upgrade to TrustQuay Portal, first launched in November 2020, this new onboarding solution allows corporate services and trust providers to deliver their clients a fast, simple and fully automated onboarding experience, with a full audit trail to help firms meet their KYC and AML obligations quickly and efficiently.

What have been the challenges you have had to overcome?

TrustQuay was formed from the merger of Microgen Financial Systems and Touchstone Wealth Management, which was completed in February last year with the new brand launched in June 2020.

Merging two businesses is never simple and we are very pleased with the growth and success of TrustQuay over the past 18 months following the integration, and how we have adapted to servicing our clients remotely during these exceptional times.

How has your business and business model reacted to the pandemic?

As a technology business, we adapted very easily to a remote working model and had all the systems in place to smoothly make this change. What has been a significant achievement during the pandemic is how we have continued to implement go-live projects for clients without being able to be on-site.

Have your differentiators become more important to your business?

Yes, TrustQuay's differentiators of product range, modern technology stack, global coverage and R&D spend continue to be very important, not only for our business but also for the sector we serve.

The corporate services, trust and alternative fund administration market is undergoing unprecedented change, with the industry players either growing by consolidation or specialising in niche areas. This will encourage rapid digitalisation across the industry.

What are the prospects for wealth management in the future?

We think the future prospects for wealth management continue to be positive. In our sector - corporate services, trust and alternative fund administration - clients are well aware of the challenges facing them, but need much more assistance in executing their plans for digital transformation.

Whom do you look to for inspiration and ideas?

While we look to other areas of financial services which are a life stage ahead in terms of technology compared to our sector, the true inspiration for ideas comes from within the TrustQuay team.

What do you hope will be the result of receiving this accolade?

We are always delighted to receive recognition from awards, especially in only the

first year of operating under the TrustQuay brand. The independent, third-party endorsement created by winning an award gives our clients comfort in their choice of provider and acts as a positive factor for new prospects. ■



Keith Hale
Executive Chairman
TrustQuay

“THE TEAM AT TRUSTQUAY IS ONE OF OUR **GREATEST STRENGTHS** AND THE DRIVER OF **SUCCESS** ACROSS OUR COMPANY.”



INNOVATIVE CLIENT SOLUTION — WINNER — TrustQuay

For Wealth Managers
To win the digital world



BETTERING THE WAY THE WORLD INVESTS

Valuefy's product Wealthfy enables wealth managers to accelerate client acquisition, deepen client loyalty and reduce client attrition with an end-to-end solution for digital client onboarding, assessment, portfolio management, trading, and compliance.



Visit www.valuefy.com for more details

HELPING BANKS, WEALTH MANAGERS THRIVE IN DIGITAL TIMES

Tom Burroughes, Group Editor of *WealthBriefingAsia*, talks to **Vivek Singal**, Co-founder of **Valuefy**, on the qualities that put the firm in the top flight of its class.

Valuefy is an international wealth-tech company from India with offices in Mumbai, Singapore, and London, serving clients across Europe, Middle East, and South-east Asia.

Valuefy's flagship product, Wealthfy, combines the best of Technology, Data Sciences, and Digital Customer Experience (CX) to help private banks and independent wealth managers thrive in the digital world. Wealthfy caters to a wide range of business use cases, ranging from a Robo-advisory solution for the mass affluent to an end-to-end Advisor/RM-driven Digital Wealth Suite for the private banking business.

Valuefy's platforms are used by leading banks and wealth managers and serve more than \$250 BB assets under management. Valuefy has been consistently awarded and recognized globally and aims to be the first choice for wealth technology across customer segments.

What do we offer?

Wealthfy offers a comprehensive array of modules viz. onboarding, data aggregation, advanced analytics, reporting, risk profiling, model portfolio, rebalancing, CRM, communication, etc. to enable a wealth manager to run his/her business digitally. The product comes equipped with security and data protection features that are GDPR and local regulation-compliant and is available for an on-premise or SAAS subscription.

We go with wealth in a box. It implies that our entire wealth infrastructure is delivered over the cloud. The company uses a standard open-source architecture that can be used by private banks and larger organizations to connect to its ecosystem. The four key layers of this approach are data, portfolio, advice, and execution. Engagement is the fifth layer that ties it together by keeping clients invested and motivated. This enables us to provide customized, high-quality financial advisory services tailored to unique marketing needs.

How has your business and business model reacted to the pandemic?

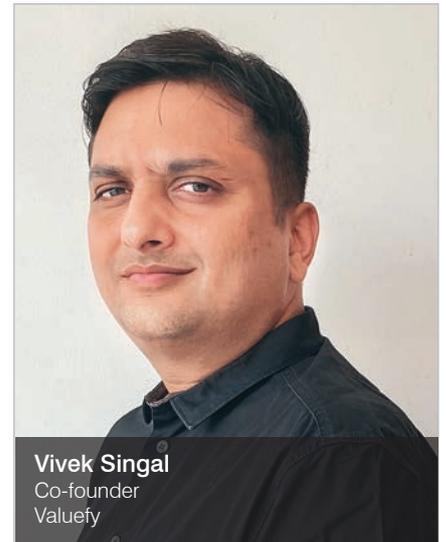
We decided to forego the traditional communication model during the pandemic and focused on delivering rich client experiences daily. We incorporated comprehensive tools and workflows right within the platform in this pandemic. It is a communication engine with video calling, instant messaging, chat, notification center, and automated approval requests. It facilitates proactive communications with a free messaging system, enabling an experience integrated with CRM for better asset transparency representation. This further helped wealth managers to reduce middlemen, get access to reliable financial services and stay on top of their investments through a single interface.

What are the prospects for wealth management in the future bearing in mind a new social and economic environment ahead?

Technology is slowly but surely taking over from the hand of management as we know it. The industry is moving towards a more sustainable model with the concept of peer-to-peer lending. The future of wealth management will consist of active alternatives to passive strategies and solutions that work within a client's personalized preferences and budgets. We see it as a great opportunity to precisely specialize in providing the finest financial product to clients across the globe. It is certain that there will be a winning pack to serve the throbbing market and disrupt the constraints in the wealth management space.

Whom do you look to for inspiration and ideas?

We are always inspired by personal experiences and the people we seek to serve. As wealth management became an ever-growing sector of the economy we have to remain alert of the need to create a resource that would help organizational leaders expand their capabilities, develop new solutions, and accelerate business innovation while creating value. ■



Vivek Singal
Co-founder
Valuefy

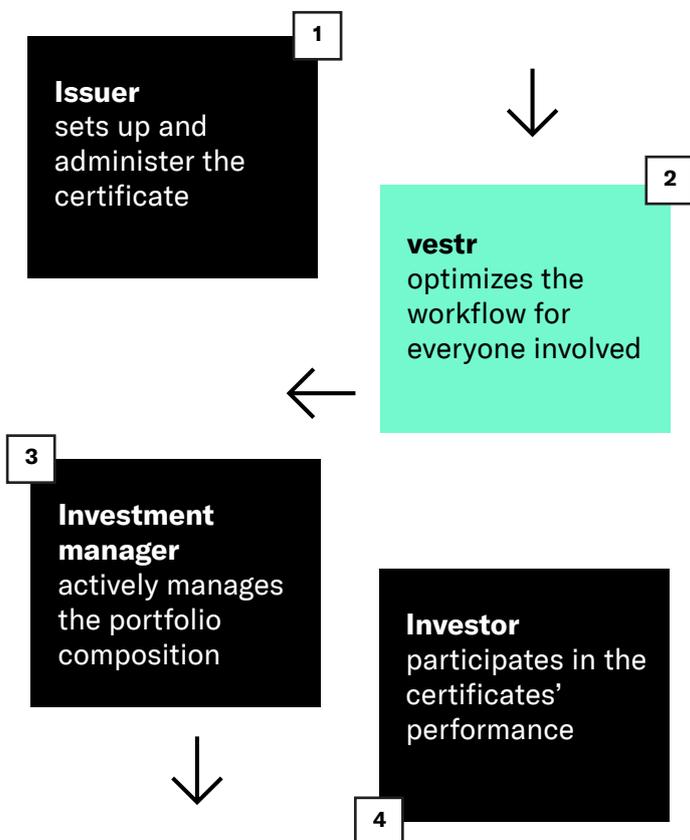


“VALUEFY’S PLATFORMS ARE USED BY **LEADING** BANKS AND WEALTH MANAGERS AND **SERVE MORE THAN \$250 BB ASSETS UNDER MANAGEMENT.**”



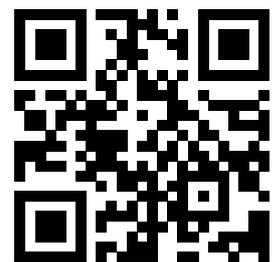
Active management is just one click away.

Issuers go digital with vestr.



We offer an easy-to-integrate platform that digitises the life-cycle management of your actively managed investment products.

Our white-label software engine handles everything from portfolio rebalancing to investor reporting and audit trails, so you can focus on your core competencies.



How can we help your issuing business grow? **Scan the code to schedule a call**

vestr

SETTING THE STANDARD FOR ACTIVE PORTFOLIO MANAGEMENT

Tom Burroughes, Group Editor at *WealthBriefingAsia*, talks to **Rico Blaser**, Chief Executive of **vestr**, about setting standards and digitising active management.

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

vestr is a Swiss FinTech company founded in 2017 by an experienced team of traders and quants with a focus on providing modern technology solutions to the field of Actively Managed Certificates. With an easy-to-integrate platform that digitizes the life-cycle management of issuers' actively managed investment products, we not only digitise but set the standard for active management.

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

After onboarding the first client two years ago, we expanded the team from a technology-driven company to a diverse organization with team members across Germany, Singapore, Switzerland, and the Ukraine. Our skills have diversified.

While retaining and extending our client base in Europe, we started our operations in Singapore fully remote.

What are you going to do to stay on the front foot in a fast-growing but also challenging region such as Asia?

With our global ambitions, we believe that having local representation is inevitable. For engaging in the local ecosystem, we employ regional team leads. In Singapore, we aim to assess legal and regulatory concerns with partners, and wish to stay close to our clients to offer solutions and adapt product to their respective needs.

What have been the challenges you have had to overcome?

One of the most obvious and trying challenges have been the existing systems of our clients. Integrating our solution with their legacy systems is possible by maintaining industry standards such as FIX protocols. With our open APIs, we empower clients as they can use our open APIs and integration is possible in a step-by-step approach.

Gradual integration allows faster time-to-market without compromising security and privacy concerns.

How has your business and business model reacted to the pandemic?

vestr is a digital native; with our cloud-based solution and tech savvy team, we have operated digital even before the pandemic. Switching to a remote setting was no added challenge for our organisation and did not have a major impact on our activities. We have always coordinated update meetings for the whole team on a regular basis, so business as well as tech teams are up to date about topics such as product or expansion plans, client engagement activities or hiring.

Have your differentiators become more important to your business? Are they still relevant?

We started out as a technology company with a focus on Actively Managed Certificates. Our current platform is growing with a multitude of features we are adding on a monthly basis. The key to our growth is customising the integration with large clients.

What are the prospects for wealth management in the future, bearing in mind a new social and economic environment ahead?

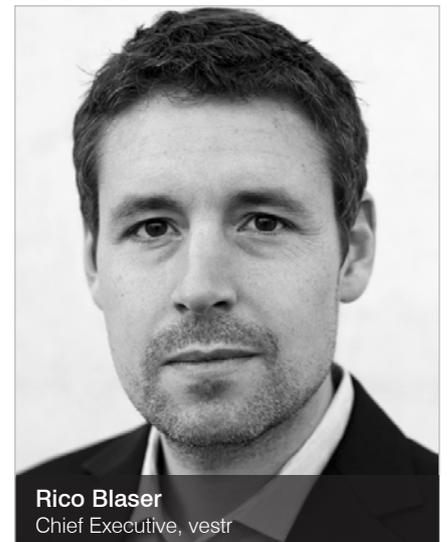
We observed an increase in mass customisation for end consumers. This means that if retail or institutional investors wish to invest based on personal values, portfolio managers and issuers need to get creative to serve those needs. While also remaining profitable and efficient. New custom indices, custom legal wrappers or personalised recommendations are among many such phenomena.

Whom do you look to for inspiration and ideas?

Our clients - through ongoing discussions we make our platform more powerful.

What do you hope will be the result of receiving this accolade?

We are new in Singapore and seek to raise awareness in Asia for active management. We believe that we built a solution that benefits many large existing issuers as well as new entrants of actively managed investment products. That is why we participate in awards, competitions and conferences to make our offerings known. ■



Rico Blaser
Chief Executive, vestr



"WE WORK CLOSELY WITH OUR CLIENTS TO CREATE THE BEST PLATFORM FOR ACTIVE MANAGEMENT."

wize

BY TW

The All-In-One
Wealth & Asset Management
Solution

CRM - PORTFOLIO MANAGEMENT - ORDER MANAGEMENT
ADMIN & BACK-OFFICE - COMPLIANCE - LSFIN/LEFIN

Geneva
Montreal
Singapore
Luxembourg
www.wize.net

 TEAMWORK

WIZE HELPS WEALTH SECTOR ADAPT IN CHALLENGING TIMES

Pierre Dupont, Managing Partner of **WIZE by TeamWork**, is in conversation with **Tom Burroughes**, Editor of *WealthBriefingAsia*, about its success and qualities.

What sets you apart from your peers?

WIZE by TeamWork, the all-in-one wealth and asset management solution, is one of the fastest growing wealthtech companies in Switzerland dedicated to independent asset managers, family offices, private banks, fund and asset managers and securities traders.

Part of the TeamWork Group, a 900+ employees Swiss company founded in 1999 and fully owned by its top management, we offer a unique 100 per cent web-integrated SaaS secured Cloud or on premise platform including:

- Portfolio management system with model portfolios and rebalancing/hedging capabilities; private equity module; risk & performance management (MWR/TWR, contribution/attribution)
- Order management system including FIX connectivity
- CRM System with KYC and document lifecycle management
- Compliance system with AML; MiFID II and FinSA pre-trade checking; risk profiling and monitoring; full audit trail
- Reporting system with white labelled customized multi-assets consolidated reports
- Invoicing system including automatic fees calculation and controlling; profitability measurement
- Multi-custodian connectivity: 150+ automatic feeds; API connectivity
- e-banking / mobile app.

With offices in Geneva, Zurich, Singapore, Luxembourg and Montreal, our team of 30 professionals aims at delivering best

in class support and back-office business process outsourcing (BPO) services.

Trusted by more than 85 clients representing 45+ billion AuM and 3000+ users in 18 different countries, we allow clients to focus on their business while taking advantage of the platform's power and scalability for an attractive all-in-one monthly fee.

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

WIZE is born out of the meeting in 2010 between Philippe Rey-Gorrez - the founder of the TeamWork Group - and Cédric Baiker, an expert in IT banking solutions who had driven the development of the swiss "Newbanking" core banking package from 1996 to 2010.

Realising that the market solutions dedicated to private banking and external asset managers were abnormally expensive, not sufficiently functional, and mainly based on legacy technologies, it was clear that in a context of increasing regulation and financial transparency, there would be a growing need for the external asset manager (EAM) community to rely on more sophisticated, functional and secure solutions that would enable them to respond efficiently to their business challenges and constraints.

What are you going to do to stay on the front foot?

WIZE by TeamWork allows wealth managers to manage all aspects of their day-to-day business in a simple and effective way: portfolio management, orders, CRM,

regulatory/compliance aspects, invoicing, back-office and e-banking access.

Our peers and competitors frequently confuse the issues and often implement a stack of different solutions that end up more costly and more complex with room for problems ahead. ■



“WIZE BY TEAMWORK, THE **ALL-IN-ONE** WEALTH AND ASSET MANAGEMENT **SOLUTION**, IS ONE OF THE **FASTEST** GROWING WEALTHTECH COMPANIES IN SWITZERLAND .”



World class technology for the future of wealth management.

Partner with LU to provide a fully-functional
wealth management APP with an end-to-end
digital experience for your customers.



Learn more at
lu-global.com/partnership

THE WEALTHTECHASIA AWARDS WINNERS 2021

GENERAL WEALTHTECH CATEGORIES (PAN-ASIA)

WINNER: OVERALL ASIA WEALTHTECH PROVIDER

avalog

An NEC Company



WINNER: CLIENT LIFECYCLE MANAGEMENT

[I M T F]



COMMENDED: OVERALL ASIA WEALTHTECH PROVIDER

LU-global.com



WINNER: CRM PROVIDER

investcloud



COMMENDED: OVERALL ASIA WEALTHTECH PROVIDER

[I M T F]



COMMENDED: CRM PROVIDER

WIZE
BY TW



WINNER: ONBOARDING PRODUCT

[I M T F]



WINNER: TRANSACTION PROCESSING SOLUTION

avalog

An NEC Company



COMMENDED: ONBOARDING PRODUCT

CONTEMI



COMMENDED: TRANSACTION PROCESSING SOLUTION

OLYMPIC | eRI
BANKING SYSTEM



COMMENDED: ONBOARDING PRODUCT

TrustQuay



WINNER: PORTFOLIO MANAGEMENT

CharlesRiver
A State Street Company



GENERAL WEALTHTECH CATEGORIES (PAN-ASIA) *continued...*

WINNER: INVESTMENT PLATFORM



WINNER: FRONT OFFICE



COMMENDED: INVESTMENT PLATFORM



COMMENDED: FRONT OFFICE



WINNER: INNOVATIVE SOLUTION



WINNER: DATA PROVIDER



COMMENDED: INNOVATIVE SOLUTION



WINNER: RISK MONITORING AND MANAGEMENT



COMMENDED: INNOVATIVE SOLUTION



WINNER: CLIENT REPORTING



WINNER: STRUCTURED PRODUCTS SOLUTION



COMMENDED: CLIENT REPORTING



WINNER: SUITABILITY



WINNER: CORE BANKING SOFTWARE



GENERAL WEALTHTECH CATEGORIES (PAN-ASIA) *continued...*

COMMENDED: CORE BANKING SOFTWARE

Julius Bär



WINNER: NEWCOMER/START-UP

BITE
alternative investments



WINNER: FAMILY OFFICE SOLUTION

FundCount



WINNER: CLIENT COMMUNICATION SOLUTION OR TOOL

CONTEMI



WINNER: ROBO PRODUCT OR PLATFORM

Valuefy



WINNER: DIGITAL OFFERING

MOONFARE



WINNER: EAM PLATFORM

Valuefy



COMMENDED: DIGITAL OFFERING

Valuefy



WINNER: ARTIFICIAL INTELLIGENCE (AI) APPLICATION

avalog
An NEC Company



WINNER: CLIENT ACCOUNTING

FundCount



REGTECH & COMPLIANCE CATEGORIES (PAN-ASIA)

WINNER: INNOVATIVE COMPLIANCE/REGTECH PRODUCT

APIAX



COMMENDED: KYC PRODUCT

KlarityRisk



WINNER: KYC PRODUCT

[IMTF]



WINNER: REGULATORY REPORTING

KAIZEN[®]
REPORTING



INDIVIDUAL & LEADERSHIP WEALTHTECH CATEGORIES (PAN-ASIA)

WINNER: GROWTH/BUSINESS DEVELOPMENT STRATEGY/ACQUISITION

WIZE
BY TW



WINNER: INNOVATOR OF THE YEAR

additiv



WINNER: REGIONAL MANAGEMENT TEAM/CEO

CONTEMI



WINNER: LEADING INDIVIDUAL

LAKSHEY GANGWANI



GENERAL WEALTHTECH CATEGORIES (AUSTRALASIA)

WINNER: OVERALL WEALTHTECH PROVIDER

CREALOGIX 



WINNER: INNOVATIVE CLIENT SOLUTION

TrustQuay 



GLOBAL AWARDS

Showcasing the best in the industry

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



2021/2022 Announcements Schedule

NOVEMBER 2021

WealthBriefing MENA Awards

FEBRUARY 2022

WealthBriefing Swiss Awards

WealthBriefing WealthTech Americas Awards

MARCH 2022

WealthBriefing Swiss EAM Awards

WealthBriefing European Awards

APRIL 2022

WealthBriefingAsia Greater China Awards

MAY 2022

Family Wealth Report Awards

WealthBriefing Wealth for Good Awards

JUNE 2022

WealthBriefingAsia Awards

SEPTEMBER 2022

WealthTechAsia Awards



For more information: + 44 (0) 20 7148 0188 (UK office)
www.wealthbriefing.com / www.wealthbriefingasia.com / www.fwreport.com



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

WealthBriefingAsia is the leading source of subscription news and thought-leadership for over 16,000 wealth management professionals in Asia.

Register for a free trial
www.wealthbriefingasia.com

WealthBriefing

FAMILY
WEALTHREPORT

Offshore**Red**

Compliancematters