EXPLORING NEW TRENDS

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FOREWORD

Tom Burroughes, Group Editor, WealthBriefing

It is my pleasure to introduce you to this publication. It is a chance for winners in these awards programmes to explain the why and the how of their success, not just because they want to celebrate what they’ve done, but share views on best practice.

This Acclaim publication is all about explanation – describing the firms and individuals who have set the bar high, and what lessons they draw from the process. The Swiss and wider wealth management sector is going through heavy change. The past few years have been extremely challenging, and the work done in adding value and serving clients deserves to be honoured.

The role that wealth management plays in the modern economy is not always sufficiently appreciated, and it can also be misrepresented. Entrepreneurs who build services and products need to have their wealth protected so they can continue the process, and achieve results such as jobs and higher living standards. Effective advice also means HNW individuals can transfer assets, whether they be to philanthropic causes, or family members, wisely and effectively. These roles deserve to be praised, and the awards programme gives the industry a chance to do this. Awards also create an opportunity to show what is being done to make this traditional sector more diverse – honouring the achievements of women in what has been a male-dominated space.

The judging process for these awards is crucial. Judges bring their industry experience to the table; they examine entrants from categories outside their immediate sector to avoid conflicts of interest and access to potentially confidential information. And we also want to thank the sponsors for their support, and all those who put the programme together and make taking part a great experience.

Please join me in saluting the award winners and all those who continue to drive excellence.

OVERVIEW OF THE SWISS WEALTH MANAGEMENT SECTOR

Switzerland is home (as at end-2020) to 243 banks, ranging from the “big beasts” such as UBS and Credit Suisse all the way through to small private banks operating – still – under unlimited liability. There are single- and multi-family offices, external asset managers (now facing upcoming FINMA regulations from 2023), as well as private client law firms and other specialists dealing with high net worth individuals. Technology firms working with banks, such as Avaloq, ERI and Appway, to name just three, are key parts of the chessboard. Switzerland is also becoming one of the world’s most important hubs for digital assets, which despite bitcoin’s volatility, remains a busy area.

The country is still the world’s single largest centre for cross-border money. It is not an accident. Geopolitical instability in some places, coupled with concerns about the aftermath of Covid and rising inflation, means a solid, stable country such as the Alpine State has a lot of credibility. A cluster of institutions build a level of expertise that has withstood changes to global regulations.

Just as the wristwatch sector reinvented itself in the 70s and 80s with brands such as Hublot or Swatch, so a younger generation of banks such as Reyl and Syz have built business, and fintechs and EAMs that serve new client segments keep Switzerland up with the latest trends.

A traditional focus on personal relationships and modern embrace of technology is a potent mixture.

Years of negative official interest rates haven’t been easy, putting banks under pressure to encourage clients to make some difficult risk decisions. The country isn’t immune to wider macroeconomic trends, nor the challenges of intergenerational wealth transfer, changing attitudes about wealth, and the ever-present calls to use financial muscle to tackle the environment. In all these cases, Switzerland is one of the most important financial centres, and looks set to remain so for years to come.
WINNER: Accuro

WINNER: aixigo

WINNER: Apiax

WINNER: Avaloq

WINNER: Barclays Bank (Suisse) SA

WINNER: Barclays Bank (Suisse) SA

WINNER: BearingPoint

WINNER: Capitalium Advisors SA
The 2022 WealthBriefing Swiss Awards programme was focused around three main category groupings: experts (individuals and teams), products and services for wealth managers and clients, and institutions of all sizes and types in the Swiss market.

Independence, integrity and genuine insight are the watchwords of the judging process with the judging panels made up of some of the industry’s top trusted advisors and bankers.
A shortlist was identified from the hundreds of entries received for these awards and a discussion took place with the judges to agree the winner of each category.

The judges were split into three groups, dependent on their industry; a panel of trusted advisors were responsible for judging the private banking categories; a panel of private bankers judges the trusted advisor categories; and new for this year we had a specialist group of tech experts judging the technology categories. This was to ensure that commercially sensitive information was kept confidential and conflicts of interest were avoided.

OSMOND PLUMMER  
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Head of Business Development and Marketing  
Close Brothers Asset Management

TOBIAS WAGNER  
CEO Switzerland MEA Investment Company

JÜRGEN PULM  
Head of Private Banking for CPB Services  
RBS

PHILIPPE STEFFEN  
Executive Director, Head of Operations  
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DAVID WALLACE WILSON  
Partner  
Schellenberg Wittmer

MATHIEU SAINT-CYR  
CEO  
Geneva Management Group

MIKE TOOLE  
Chief Operating Officer  
Artorius Wealth

RAY SOUDAH  
Chairman and Founding Partner  
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WILLIAM TROUT  
Director of Wealth Management  
Javelin Strategy & Research
At Accuro we have a unique vision. It drives everything we do in pursuit of our mission – to care for families and their wealth responsibly across generations. We are wholly owned by our management and staff. This true independence empowers us to take decisions with insight and continuity for the long-term benefit of our clients, our people and our planet.

accuro.com
INDEPENDENCE AND CONSTANT QUEST FOR IMPROVEMENT AT ACCURO

Natacha Onawelho-Loren, Managing Director, Accuro Trust (Switzerland) SA, talks to WealthBriefing Group Editor Tom Burroughes about the firm’s qualities that have shone this year.

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

We are an independent company, wholly owned by our management and staff. This enables us to make our own decision having regard to the interest of all our stakeholders. We have enshrined this principle in the articles of association of our holding company.

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

Without our people there would be no Accuro but it is also about promoting a culture of collaboration and support within our team, pulling together in the best interest of our clients. The measure of our success is testimony to the dedication and hard work of the whole team.

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

We are constantly questioning how and what we can improve on our client service delivery. We always strive for a holistic client experience and are also investing significantly in the digitalization of our business.

Within the group, we have created our own Academy and roll out training across all offices on various subjects to ensure our people get access to and are trained on the latest market knowledge and skills. We embraced the B Corp movement and now endeavoured to apply its tenets. This was a bold move for offshore Trustee. We recognise that as trusted advisors to the wealthy, we are ideally placed to engage with our clients and their next generation about the best way to integrate responsible stewardship of family wealth into wealth planning and the deployment of capital. We believe that wealth with a purpose has never been more actual. We see that in conversation with our clients across all age groups and not only with the next generation.

The next generation is very aware of global issues. What is novel is their will to tackle these. They mean business.

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

The main challenges were to keep the culture and the quality of services whilst working largely virtually.

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

Our business model has proven to be very resilient during the pandemic and technology has contributed to this success. At the start of the pandemic, we aimed to support mental health in the workplace, for work life balance and for making a positive impact in our daily working lives. This has translated into the adoption of a working from home policy which applies now and will continue to do so post pandemic. We also organised mental health well-being sessions with a partner company specialised in that area. Very early on, we understood it could have a significant impact on the company.

What lessons have been learnt that can be carried forward?

Our society’s economic growth model has become unsustainable. The pandemic has further exacerbated the need for businesses and wealth owners to apply more sustainable practices. We believe it is in Accuro’s interest to bring its resources to a system that helps everyone to succeed.

Have your differentiators become more important to your business?

I would say they are even more relevant now. The world is more and more complex and changes can happen so quickly. Families are looking for companies who not only can help them navigate this fast paced, complex, global environment but also who can provide an anchor of stability in this turmoil. Being independent, able to make your own decisions and committed to high value client delivery has never been so actual.

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

Global wealth continues to grow at pace, especially in the UHNW space. What is already changing is an acceleration of sustainable investing and a shift of wealth creation towards Asia and Africa. The purpose of wealth is changing too, and the next generation of wealth owners will be looking for advisors who are attuned to this while at the same time being at the forefront of the industry.

Whom do you look to for inspiration and ideas?

My peers, colleagues, talented individuals working in sectors different from me.

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

Winning a Wealthbriefing Award means a great deal to us. It motivates our team by acknowledging their efforts but also signifies to the market that the judges recognise the consistency by which we deliver high quality services.
Driving the New Wealth Experience.

aixigo:BLOXX – Wealth Management Platform

“A buy-and-build approach to technology allows banks to maintain their building spirit yet get a project up and running much more.

By creating a hybrid system that combines third-party components and internal development, innovation can take place with minimal effort.”
For over 20 years, aixigo has been developing wealth management software for financial services providers. Our product, aixigo:BLOXX, consists of various modules that can be combined to offer game-changing solutions to end clients based on cutting edge technology. With this focus, we have managed to provide our customers with real value-adding solutions and a unique technology that is still leading in the field.

We are honored that our portfolio management tool has been recognised in the category of ‘Implementation of a Technology Solution’ of the WealthBriefing Swiss Award 2022. This is a solution that allows private banks to digitise the private banking experience and their unique investment philosophy without losing the human aspect, therewith speed and flexibility - has become more important than ever. A bank can’t afford to implement costly new solutions every day, though innovation and differentiation usually come at a cost. With our platform, we lay the foundation for future innovation that can be done directly by the bank itself.

At the same time the bank profits from our fast innovation cycle on the core. This is how, within a few months, our clients manage to turn our off-the-shelf portfolio management solution into financial planning services, crypto and digital assets offerings and B2B solutions.

But creating this platform standard and off-the-shelf solution that serves a broad customer spectrum and at the same time helps banks to differentiate themselves wasn’t always easy. We had to take risks and make decisions while aiming at a moving target. As such, we as any other firm need to constantly review cost and benefit of new features of our platform, but when done correctly, this helps us to stay focused and keeping our leading position.

We also need to be open and learn from other industries. One of the most differentiating aspects of our technology and architecture for example was taken from the video gaming industry. Still, big tech and the like is often seen as a threat to traditional wealth management, but we like to see threat as opportunity.

While there is no sense in all wealth managers becoming big tech, it remains a fact that differentiation doesn’t come by digitising necessities. But unless necessities are digitised, real differentiators a bank wants to be known and chosen for can’t be created. Wealth managers need to collaborate with technology partners to cut the curve of innovation in order to set themselves apart, without losing valuable time. They will then be positioned to appropriately address evolving market segments - young people, female investors, the digital-savvy elderly, and offer new, differentiated services. There are a lot of opportunities, and a lot of possibilities.

Delia Steiner, Country Manager Switzerland, aixigo, talks to Tom Burroughes, Group Editor of WealthBriefing, about the firm’s accomplishments.

Delia Steiner
Country Manager Switzerland, Aixigo

“A BANK CAN’T AFFORD TO IMPLEMENT COSTLY NEW SOLUTIONS EVERY DAY, THOUGH INNOVATION AND DIFFERENTIATION USUALLY COME AT A COST. WITH OUR PLATFORM, WE LAY THE FOUNDATION FOR FUTURE INNOVATION THAT CAN BE DONE DIRECTLY BY THE BANK ITSELF.”
Removing regulatory barriers with embedded compliance

Join forward-thinking financial institutions around the world that use embedded compliance to grow their businesses compliantly.

- Store client data
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Accelerate global growth
Avoid regulatory and reputational risks
Decrease regulatory costs

Learn more at www.apiax.com
BAKING COMPLIANCE INTO WEALTH MANAGERS’ SYSTEMS

Tom Burroughes, Group Editor of WealthBriefing, interviews Philip Schoch, CEO of Apiax, about his firm’s success in reaching award-winning excellence.

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

We’re the first regulatory compliance solution that is fully embedded into its clients’ tools and processes via a set of regulatory APIs. We’re the only solution that allows its clients to pick and choose their digital regulatory compliance content from some of the world’s most prestigious law firms.

We offer the broadest coverage of regulatory answers on the market, covering more than 150 jurisdictions. We’re the only solution that completely replaces cumbersome policies and manuals with clear yes or no answers.

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

A mix of our founder’s expertise was a great starting point. In 2017, I founded Apiax together with Nicolas Blanchard, Thomas Suter and Ralf Huber. Coming from backgrounds in technology, product, compliance and marketing, we had witnessed the effects of increasing regulatory complexity first-hand, and had the same vision of making compliance available digitally via a simple API.

We quickly built an experienced team with leaders in sales, customer success, marketing, software engineering and product. Bringing the right people on board is crucial. Hiring locally in our target markets also plays an important role that contributes to our traction.

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

We invest into customer success to be able to onboard more clients faster, with a great experience. Resources such as a Knowledge Base or Developer Materials help with faster onboarding.

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

To find and hire the right talent, you need to convince people of your company, product and future. Today, finding and retaining the best talent on the market is more challenging than ever. Our product has the potential to revolutionise compliance.

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

If anything, the pandemic has helped the financial industry move faster towards digital solutions, which has helped us.

As a company, we have reacted with moving to a hybrid work mode. We still maintain our offices, but with more flexibility to work from home. We think that this will endure. Our employees have the flexibility to work from where it makes sense for them. But we also think that meeting in person is energising. With our new work mode, we enable both.

What lessons have been learnt that can be carried forward?

We are an early mover. Our solution has not yet reached the mass market. Our first clients have been early adopters. Now, it’s all about showing the value we provide to the mass market. The market education that is necessary for this cannot be overestimated.

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

Four years into the project and with new clients onboard, our aim continues to be the same: to turn compliance into a business enabler for our clients. There is no doubt that embedding compliance into every activity is the way to go and grow.

Has morale amongst your colleagues held up well during the pandemic? What have you done to bolster their spirits?

At the beginning of the pandemic we pretty quickly adapted to the needs and safety of our employees with working-from-home set ups. We continue to encourage and enforce safety first processes, in everyone’s interest. To boost team morale in these extraordinary times we started doing virtual team-building activities in 2020 — which we continue to do and enjoy.

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

We envision a global digital economy based on a fair and sustainable financial system where all participants play by the same rules and where compliance is standard. This vision is in line with the reality of the digitising economy and the social and economic trends of our time. We are very confident that we can contribute to this future.

Whom do you look to for inspiration and ideas?

Some API-first tech companies such as Stripe or Twilio have impressively shown how data can be embedded into every digital sales transaction or interaction. This is inspiring as they did the same market education that we are doing today and have become world leading companies. I find inspiration in people that detect passion in what they do for a living.
59% of the investors we surveyed have either switched their financial advisor in the past 5 years or are thinking of doing so

Source: Avaloq survey, 2021

Increase client loyalty by guiding them to their financial goals with Avaloq Wealth, the only solution that covers the full investment journey
WHY SCALABILITY IS CRUCIAL IN WEALTH MANAGEMENT TECHNOLOGY

Georges Roten, Head of Switzerland & Liechtenstein at Avaloq, talks to WealthBriefing Group Editor Tom Burroughes about his firm’s success.

What does winning this accolade mean to you?

This award is recognition of Avaloq’s drive to constantly innovate. It also underscores the trust our clients place in us as a global leader in wealth management technology. That’s why I am very proud to accept this award on behalf of Avaloq.

What sets you apart from your competitors in front office solutions?

Avaloq has the capacity and expertise to offer substantial scale to wealth managers, with innovative digital banking solutions that are tailored to the evolving needs of investors.

For instance, Avaloq Engage brings advisors and their clients closer together and satisfies the growing demand for conversational banking. This product line includes the Engage App, which lets clients contact their advisor seamlessly through social messaging services such as WhatsApp. Avaloq Engage harnesses AI-driven natural language processing (NLP) to instantly respond to client requests and offer individualised product recommendations.

Another good example is Avaloq Wealth, which is designed to help advisors create hyper-personalised portfolio recommendations based on client profiling and transaction data. This product line includes Investment Advisory, which enables advisors to create bespoke investment proposals in real time during client meetings.

Where do you see major challenges when it comes to technology in wealth management?

Wealth managers need a technology partner that can help their business scale globally while providing investors with personalised advice. Investors’ expectations are becoming increasingly diverse, especially as the next generation starts to make its mark in financial markets. Not only do wealth managers need to offer cutting-edge solutions to these more digitally attuned investors, but they’ll also be competing with a wave of new fintechs for their loyalty.

What does this mean for Swiss wealth managers in particular?

Switzerland is a major incubator and accelerator for fintechs, which are competing with established institutions for market share. To stay competitive, wealth managers need to be open to collaboration with up-and-coming fintechs. I believe the open banking approach offers significant innovation potential for wealth managers here in Switzerland; however, for an ecosystem to flourish, we need a stronger culture of cooperation between the various industry players.

What actions is Avaloq taking to stay on the front foot when it comes to digitalisation?

We conduct our own extensive research into market trends and investor behaviour. Our models show that investors prefer a hybrid approach to digitalisation which combines AI and human contact. We help wealth managers find the sweet spot for their clients by automating aspects of portfolio management and facilitating even closer contact between advisors and investors.

How do you see wealth management changing in the future?

A key trend that will shape the market is the democratisation of wealth management – giving more people access to professional financial advice. With the right technology partner, wealth managers can efficiently scale their business to cut across wealth classifications, from UHNW to mass affluent investors. And as demographics continue to shift, advisors will also have to contend with a more diverse – and often conflicting – range of needs. By embracing innovative technology to support their value proposition, wealth managers will be able to benefit from these megatrends and stay ahead of the competition.

Georges Roten
Head of Switzerland & Liechtenstein
Avaloq
WHAT WORLD WILL YOU MAKE POSSIBLE?

Have a greater impact on the future you envision with access to sustainable investments

Influence tomorrow

Barclays offers private and overseas banking, credit and investment solutions to its clients through Barclays Bank PLC and its subsidiary companies. Barclays Bank PLC is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register No.122702) and is a member of the London Stock Exchange and NEX. Registered in England. Registered No. 1026167. Registered Office: 1 Churchill Place, London E14 5HP.
BRINGING FULL POWER OF A GROUP TO PRIVATE BANK CLIENTS

Rahim Daya, CEO, Barclays Switzerland & Head of Middle East, talks to WealthBriefing on what has set the bank apart.

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

At Barclays Private Bank, we unleash the full power of the global Barclays network and bring our investment and banking experience, insight and tailored opportunities to family offices and UHNW clients. Some of the key things that differentiate us are our international presence, our close collaboration with Barclays leading investment and corporate bank and the quality of our banking, credit and investment products and services. We are the last British bank in Switzerland and offer a global platform locally. Clients often tell me that that’s what they like about Barclays.

In terms of products, we provide clients with a broad and unique offering, giving them access to a fully efficient platform of financial instrument and services, including managed portfolios, alternative investments, private equity and direct investments in companies in different geographies and sectors.

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

In terms of our overall strategy in the medium term, I believe that Barclays’ capacity to serve local and international clients thanks to our international footprint and our flagship discretionary portfolio management offering will continue to be key differentiators in this volatile environment.

I also see many opportunities to further strengthen and develop relationships with family offices. They are a key focus for us globally and in Switzerland as they are growing in popularity among the UHNW. Family offices often have complex personal, professional or cross-border situations, which bring unique challenges that not all private banks and asset managers can address. Thanks to our ability to provide clients with bespoke solutions wherever and whenever they need them, we are well placed to serve global and Swiss family offices by surrounding them with the right team of advisors and specialists.

We are also continuing to seek out opportunities to accelerate our growth in our core international markets, including Swiss Domestic, Russia, Eastern Europe, Israel, the Middle East and Sub-Saharan Africa.

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

One challenge is the rapid evolution of clients’ needs in terms of digitalisation. As baby boomers slowly transfer their wealth to future generations, the way clients want to deal with their private bankers evolves rapidly. We - and the industry in general - have had to adapt fast to the evolving needs of younger wealth creators and rethink banking given the higher digital engagement seen in the past months, which continue to redefine relationship management in a digitally connected world.

The private banking environment in general is challenging. The industry is facing global margin compression and very aggressive pricing competition. This means that we have to continue to anticipate and adapt our business model to the challenges of these times and respond to the changing needs of our clients, who are increasingly more interested in areas like ESG and alternative solutions.

What lessons have been learnt that can be carried forward?

I believe that one of the lessons that the pandemic has helped investors understand is the importance of being invested, active management and the advantages of building a high quality and diversified portfolio that can stand the test of time. It has also highlighted the importance of succession planning and engaging the younger generations in the transition of wealth.
NEW BANCING

STARTS WITH YOU

BearingPoint®
INDEPENDENCE, CLEVER POSITIONING WORKS FOR BEARINGPOINT

Stéphane Bellac, Partner at BearingPoint Switzerland, sets out the firm’s award-winning prowess and the reasons behind it.

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

At BearingPoint, we are proud of our long-standing independence at the core of our DNA, characterised by our private ownership structure. Our independent partnership since the MBO in 2009 means autonomy far from short-term pressures from external shareholders. It enables us to provide best-in-class advice to our clients without risking conflicts of interest with other business units.

Our positioning as a management and technology consulting company is a differentiating factor which enables us to overcome our clients’ complementary IT and business challenges.

In the wealth management consulting area, our independence stands out by not being bound to any partnership or agreement with financial software vendors. This position enables BearingPoint to best serve its clients in an independent manner according to their interests.

Our agnostic position in the market is also strengthened by BearingPoint’s independence in outsourcing offerings (ITO/BPO), enabling us to best assist our clients in defining their operating model.

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

We strongly believe that the key to our success, which is notably materialised today by winning this WealthBriefing Swiss award of ‘Best Management Consultancy’, relies on our colleagues, our greater asset.

This people-centric approach constitutes a founding pillar of BearingPoint’s values and has even been sharpened since the global covid pandemic. Our colleagues have demonstrated an incredible remote commitment during this challenging period, which even led us to implement rules to preserve their work-life balance and well-being.

Thanks to a subtle mix of both engineers and business profiles with diverse backgrounds, we are able to deliver projects and guidance to our clients in a holistic manner in accompanying their digital or target operation model transformations and enhancing their operational excellence.

With offices in Zurich and Geneva as anchor points in German- and French-speaking Switzerland, we consist of a diverse team and can support private banks as well as asset managers in all their locations throughout Switzerland.

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

We are entering a new world where digitalised organisations and processes are no longer an added value, but a standard commodity. Employees, clients, regulators, third parties are all demanding it.

Economic and social relations have been disrupted in many respects. Our relationship with our customers has evolved due to the new ways of working but similarly, the relationship of RMs of wealth managers with their clients also shifted to remote meetings and communication. In that context, building trust is more important than ever to keep working all together.

In this changing economic and social environment, sustainability considerations are becoming more and more central. Social and environmental risks are taking an increasing share in the traditional risk-return ratio due to unpredictable phenomena caused by climate change, loss in biodiversity, and social change. Social society, including high-net-worth individuals (HNWI), put ESG at the forefront of the agenda and thus demand transparency of their investments, focusing on non-harmful and impact investing.

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

With nearly 5’000 employees in Europe, BearingPoint’s reputation is already well established, especially in neighboring countries such as France and Germany. This award is a way to validate our undeniable positions in the Swiss market (both German-speaking and Western Switzerland cantons).
As a WM client you want services and solutions that reflect your ambitions. Our service model is centred on personal relation and expertise. Our community of dedicated experts is here to bring your wealth where it matters to you.
What sets you apart from your peers this year and why?

BNP Paribas Wealth Management is a leading global private bank and the largest private bank in the Eurozone with more than €400 billion worth of assets under management as of December 2021. Organised through three hubs in Europe, Asia and the United States, we have over 6,800 professionals who support high net worth and ultra-HNW individuals in protecting, growing and passing on their assets.

One of our key differentiating factors relative to our peers is our “OneBank” approach which brings our clients access to the entire BNP Paribas Group, including retail banking, corporate and investment banking and our asset gathering businesses and to highly sought-out solutions from experts in real estate, asset management, prime brokerage services, M&A, and others.

Our strong credit offer provides our clients with a full range of credit solutions, with a dedicated team of senior credit structurers who can bring sophisticated transactions to fruition. Our offer covers the full spectrum of financing possibilities, from plain vanilla Lombard to structured credit solutions including single stock lending, cash flow or illiquid asset financing, residential and commercial real estate, or jet and yacht financing.

In the field of structured products, our clients appreciate our capacity to adapt and innovate. Our “Positive Banking” vision combines our banking DNA with the relevant experts in the organisation to find the best solutions with the experts in the organisation to meet our client’s needs.

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

BNP Paribas Wealth Management has a strong growth ambition in the coming years, mostly driven by a growing footprint on the Swiss onshore market. Our driving pillars are to become the “Bank of choice” for international Swiss residents and Germans investing in Switzerland as well as to accelerate our growth in the Middle East region.

We will reinforce our position as a front-runner in Environmental Social & Governance (ESG) and leverage on our sustainable value proposition.

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

The current challenges in our industry are a very low (sometimes negative) interest rate environment, increasing volatility, constant evolutions in the regulatory environments, and all this in the context of an unprecedented health crisis.

Our mission at BNP Paribas Wealth Management is to help and transform these complex challenges into opportunities for our clients and continue to accompany our clients to successfully achieve their ambitions.

Whom do you look to for inspiration and ideas?

We believe our clients have the extraordinary power to impact the world. So yes, our very first inspiration comes from our clients themselves. Since 2019, we have been engaged in a continuous quality improvement loop involving our clients directly. Applying the Net Promoter Score® methodology, we have collected hundreds of feedbacks from our clients directly in order to hear their ideas, convert them into concrete actions plans and improve our offer and services. Our clients all have different outlooks, but frequently share several common interests and concerns.

Another source of inspiration is society itself and how it is evolving. Our investment strategy team is constantly monitoring the latest trends in order to identify new developments (metaverse, circular economy, innovation...) and transform them into investment thematic solutions such as our 5 investment themes for 2022.

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

We are very proud to receive these accolades. These are very prestigious awards in our industry, and they are the recognition of the hard work put in by our teams as well as an endorsement of our strategy. It is also a testament to our strategic growth plan, our vision and purpose. These rewards reflect our ambition to be the best every year and push us to strive for excellence. We are convinced they will provide even more visibility to our franchise and help us continue growing in this industry.
LASER FOCUS ON SUCCESSFULLY CLOSING DEALS FOR CLIENTS

Ivan Vanderhyden, Executive Director, Business Aviation Concepts, discusses his firm’s accomplishments with WealthBriefing.

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

As a consultancy, I would have to say that it would be difficult to pinpoint one particular “trait”, but rather a cumulative package of having great levels of empathy and understanding towards our clients concerns and requirements, resiliency and keeping a laser focus towards successfully completing and closing transactions for our clients.

Additionally and so very important to add is the support which is always readily available to me from my industry partners, specialists and the original equipment manufacturers (OEM).

This combination cultivates an environment where our clients’ needs and expectations can be met with data that has real time accuracy and an end product which is delivered with full transparency.

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

When the pandemic initially took hold on a global scale around March 2020, it was very difficult to ascertain then what the following weeks and months would hold. When the world eventually went into a full lockdown scenario with country borders closing and the world-wide fleet of commercial airlines and business jets being grounded, it quickly became very clear that COVID-19 would change our lives forever.

Business Aviation Concepts immediately responded to the urgent requirement and successfully completed multiple PPE Transportation flights, Emergency Medical evacuation and repatriation flights of VIP’s, reuniting them with their most valuable assets, their families.

Subsequent to this, while COVID-19 ceased global movements, Business Aviation Concepts began immediately participating in webinars and daily briefings with industry experts. We carefully examined all data being brought forth on the state of global business aviation and consistently shared it to our existing valued clients and additional new potential family offices, ultra-high net worth individuals, CEO’s and heads of states clientele who were now understanding that their previous travel patterns on commercial airlines, even if in First and Business Class, was going to change and they required a sound, transparent and knowledgeable guiding voice to assist them in their future decision making.

With this information and despite the then unknown impact of COVID-19 on the global economy, our clients gained confidence with the knowledge that their business aircrafts’ net asset values, while reducing temporarily, were not going to be a repeat of the Global Financial Crisis of 2009. As during that time, business jet values plummeted, pre-owned business aircraft inventory skyrocketed and the resulting bank financing defaults and the fundamentals of the business aviation industry suffered serious set backs, which would take the next decade to correct.

As far as new working “practices”, I think what COVID-19 revealed to all of us, was an increased need for empathy, understanding and sustaining a true connection with our clients’ in order to deliver to them precisely the real world data they required along with a sense of comfort, knowing that they were in good hands and someone was always working with their best interest kept in the forefront.

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

I do hope and envision that receiving this accolade will provide our clients and family offices, both present and future, an increased level of comfort and confidence in Business Aviation Concepts knowing that, as an advisory firm, we have been able to persevere throughout a very difficult pandemic while at all times maintaining the highest level of transparency, integrity and empathy towards their business aircraft desires and needs.

Ivan Vanderhyden, Executive Director, Business Aviation Concepts

“A CUMULATIVE PACKAGE OF HAVING GREAT LEVELS OF EMPATHY AND UNDERSTANDING TOWARDS OUR CLIENTS CONCERNS AND REQUIREMENTS, RESILIENCY AND KEEPING A LASER FOCUS TOWARDS SUCCESSFULLY COMPLETING AND CLOSING TRANSACTIONS FOR OUR CLIENTS.”
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CAPITALIUM’S INDEPENDENCE, INVESTMENT FREEDOM SETS NEW STANDARDS FOR CLIENTS

Alain Zell, Chief Executive Officer of Capitalium Advisors SA, talks to Tom Burroughes from WealthBriefing about his firm’s award-winning qualities.

Capitalium’s independence, investment freedom sets new standards for clients

Tom Burroughes talks to Alain Zell, Chief Executive Officer of Capitalium Advisors SA.
Private Banking for Global Citizens

We serve worldly, wealthy individuals and families with a customized private banking service that crosses borders.

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Visit www.citiprivatebank.com to discover more.
A STRONG PARTNER TO UHNW INDIVIDUALS, FAMILY OFFICES – CITI PRIVATE BANK

WealthBriefing talks to Laurence Mandrile-Aguirre, Head of Citibank Switzerland, about the bank’s accomplishments.

What sets you apart from your peers this year and why?
Citi Private Bank (CPB) assists many of the world’s wealthiest clients including 1,400 family-owned businesses and family offices (FOs). From nascent to well-established, our integrated organisation puts the full force of our firm behind an offering designed to help protect and grow their wealth.

In Switzerland our business strategy is focused on family offices and ultra-high net worth clients.
We partner with Citi Institutional Clients Group and Citi Commercial Banking in Switzerland and globally. This allows us to offer FOs with access to all of Citi’s capabilities available across our network.

Another differentiator is our Private Capital Group team focusing on family offices and delivering institutional services to clients with sophisticated needs.
Finally, our tenured presence in Switzerland and globally allows us to anticipate, identify and understand trends in the marketplace and act on them for the benefit of our clients. We are present in 96 countries with 80+ trading floors and serve clients across 180 jurisdictions. This is a unique model that would be challenging to replicate in today’s environment.

Has morale amongst your colleagues held up well during the pandemic?
Maintaining a culture of well-being for our employees is critical to our success. With the aim of supporting colleagues through all life stages, and help them manage work and family life, we launched benefits and welfare programs including ten days of unpaid leave, sabbatical leave between two and six months and expansion of our paid parental leave policy.
Citi also created Citi Reset Day a firm-wide holiday to make sure everyone can relax and enjoy time with family.

We now have a confidential assistance program provided by an external vendor that gives our employees access to specialist support through different life events such as: abuse, personal development, mental health, grief and more. We also kept alive simple initiatives, such as virtual team competitions, virtual choir performances, and sports challenges. It keeps us connected to each other.

How have your colleagues contributed towards the success of your organisation?
With Markets recently being in untested territory, we provided frequent market updates and investment guidance to our clients. The equity market ended up performing very well. Our CIO was instrumental in providing market views to our clients. We advised our clients to stay invested, overweight equity and not stay in cash as inflation started to increase.
Our discretionary mandates performed strongly. CPB manages about $100 billion of those and our performance is first quartile. Delivering consistently strong risk adjusted returns is fundamental. That’s how we retain our clients’ trust and grow their wealth.

What are you going to do to stay on the front foot in a fast-growing but also challenging region such as this?
We are committed to drive positive social and environmental impact through our products and services.
Our clients have a growing appetite for impact investing and want to see their sustainable values, such as clean energy, education and diversity reflected in their portfolios. We put teams together from the sustainability research group to the innovation teams who cooperate to bring new offerings and advise clients on achieving their ESG goals.

We enhanced our digital capabilities with new onboarding processes, online research access tools, live portfolio performance updates and gap analysis. We integrated a series of AI and Fintech features in our big data systems. Building stronger teams with our diversity, equity, and inclusion values as a foundation is vital. Our collaborative and client centric culture has proven to attract talent.

What have been the challenges you have had to overcome to reach such a standard?
Our industry thrives on relationships, human interaction, networking, and connectivity. To overcome the challenges faced by zoom fatigue, we developed internal protocols that adapted swiftly to changing sanitary measures.

We challenge ourselves to find new ways to engage with our clients and offer them valuable content. Our virtual family office leadership program connected with more than 3,700 of our clients with high-profile speakers.

Laurence Mandrile-Aguirre
Head of Citibank Switzerland
GREAT TEAMS FOR GREAT CHALLENGES!
KEEPING ABREAST OF CLIENTS’ EXPECTATIONS IN A FAST-MOVING WORLD

Jean-Philippe Bersier, Sales Director at ERI, explains to WealthBriefing’s Tom Burroughes his firm’s formula for enduring success.

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

This year has been a challenging one again, we have had to adapt to many changes and to evolving demands from our customers. The Swiss wealth management market is under pressure to be more profitable and we have witnessed a significant number of mergers and acquisitions. Remaining in touch with the realities of the market is one of the reasons for our success. Close cooperation with our clients and partners ensures that our solutions are in line with fast evolving market needs and clients’ expectations.

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

Thanks to a strong team spirit, ERI has built up solid expertise by envisioning future enhancements realistically while ensuring the efficiency of the existing product for our clients’ day-to-day use. This is especially true in the area of compliance, where more and more regulations are being introduced. All our achievements are driven by our total dedication to providing the highest level of service.

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

In our experience, listening and taking the needs of our clients on board are fundamental to staying in the game. It means you have to understand what will really bring added value to their day-to-day business and make sure your solutions evolve in that direction. As Switzerland is a very competitive market, those banks that have been able to offer extended personalised digital services during the pandemic have managed to attract net new money.

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

Not being able to be physically close to our clients while managing implementation projects has completely changed the way we work. Although this was not totally new for us, since we have been delivering projects remotely for a number of years, we had to enhance our project methodology to ensure our quality levels were maintained. Our teams had to adapt quickly and make sure that they would keep the processes seamless. The agility and reactivity put in place has shown how flexible our structure can be.

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

Well yes, more than ever our dedication to empower our clients with problem solving tools is our main objective. We are therefore keen to support them in implementing streamlined and automated processes that will drive innovation, enabling them to focus on the key business objective: their clients’ satisfaction.

We have developed solutions that are able to adapt to very complex and specific requirements. As consolidating and understanding data is crucial for private banks and wealth managers, we make sure they receive the right data at the right time and that it is fully accurate to enable them to deliver the personalised services their customers are looking for.

In addition, as eliminating complexity and ensuring business continuity has become pivotal, leveraging a newly created SaaS model will help banks increase operational efficiency and workforce productivity.

Therefore, being able to interface and integrate Fintech solutions is seen as a key differentiator now that Open Banking has come into force and is mainstream. Thanks to its open connectivity with APIs and its service-oriented architecture, OLYMPIC Banking System allows banks and wealth managers to widen their service offerings and attract new customer segments and assets to develop new income streams. Providing options for alternative investments (REITs, SRIs, ESG investing, private equity, philanthropy, cryptocurrencies, etc.) is key to customer retention and acquisition in a market landscape where opportunities for diversified investment services evolve quickly.

This will not only ensure banks can adapt their business models to fast evolving market needs and regulatory constraints, but will also facilitate a holistic approach to the customer lifecycle while optimising performance and minimising risks.

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.
Rewarding innovation

Lemania’s 100% digital pension platform is the first in Switzerland to include a dedicated pension fund. Launched three years ago in a rapidly changing wealth management market, this remarkable innovation has now been recognized with a Wealth Briefing Award, which highlights our know-how, leadership and commitment to creating the solutions of tomorrow.
LEMANIA PENSION-HUB, AT THE FOREFRONT OF DIGITAL PENSION PLANNING FOR ASSET AND WEALTH MANAGERS

Created at the initiative of the Gonet & Cie private Bank and with the support of the Mirabaud Group, the lemania-pension hub is the first pension platform integrating a dedicated pension fund. Both the lemania-pension hub and the Lemania Pension Fund, backed by the Pictet Group, were launched the 26th September 2018. It uses a unique approach integrating a one-stop shop for pension brokers and authorised asset managers. This unique concept was envisioned by the 3 here-by foundations operating in the Swiss pension industry:

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

The platform is fully digitalised for its partners and active in pension planning and asset management. On the one hand, the onboarding of end clients by the partners is done via a Client Lifecycle data Management (CLM) Dashboard with digital signature and on the other, the comparison of mutual funds available for investment is done through a web interface.

The challenge for occupational pension planning lies in maintaining the level of savings accumulated throughout a professional career. In the current complex economic environment, as marked by the Swiss negative interest rate policy, the challenge of benefiting from efficient capitalization is strategic.

According to recent statistics from the Swiss Federal Statistical Office, over four million people are concerned by this issue in the context of occupational benefit plans. This issue is thus one of the major concerns of citizens who find themselves very much on their own when it comes to interacting with their pension funds. In practice, pension brokers are among the major players in the Swiss occupational pension system. Over 80 per cent of the financial flows linked to pension funds are controlled by them.

In this context, the strategic objective of the “lemania initiative” was to be the first Swiss pension platform capable of offering digital pension solutions through a B2B2C approach and thus provide a response to one of the major concerns of the Swiss population. In addition, the platform supports pension brokers in the digital transition of their business by providing an innovative and unique solution for the digital integration of pension planning processes. This digital platform is based on a vertical approach integrating the first one-stop shop for pension brokers as well as authorised asset managers.

The platform therefore offers a comprehensive range of individual and occupational pension solutions to brokers and asset managers as part of their occupational benefit and private pension activities. The qualitative objective of the platform is to enable end beneficiaries to build up their pension savings on the basis of an open structure of investment funds as well as offer a digital interface for pension advisors and their clients that is easy to use and understand using of a “Weather Forecast” for mutual funds. Partner solutions can also be White-labelled.

Finally, one of the main added values is undoubtedly the simplified digital signature process allowing users to digitally sign their wealth manager proposals. The FLLP and FRPI foundations were the first two foundations in Switzerland to obtain recognition in this regard from their Supervisory Authority in November 2019.

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

Nelson Santschi, Wealth & Investment Solutions Officer, Gonet & Cie SA
WE FOCUS ON RESPONSIBLE FINANCE SO YOU CAN FOCUS ON SUSTAINABLE WEALTH.

Shaped by more than 145 years of experience supporting families and entrepreneurs around the world, Indosuez Wealth Management offers in Switzerland via its Swiss entities a tailor-made approach that allows their clients to build, manage, protect and pass on their wealth according to their goals and ambitions. In coordination with the Crédit Agricole group, their employees are committed to addressing environmental, social, and governance issues to pursue consistent progress and ceaseless value creation. Indosuez Wealth Management is the global wealth management brand of the Crédit Agricole group and is present in Switzerland via CA Indosuez (Switzerland) SA and CA Indosuez Finanziaria SA. As a whole, the Indosuez Wealth Management group is present in 10 locations and counts more than 3,000 employees.

CA Indosuez (Switzerland) SA
4, Quai Général Guisan - P.O. Box 5260 - CH-1211 Geneva 11
ca-indosuez.ch

CA Indosuez Finanziaria SA
3, Via Ferruccio Pelli - CH-6901 Lugano
How have your colleagues contributed towards the success of your organisation?

The pandemic has led to lasting changes across the board. At Indosuez Wealth Management, the crisis contributed to accelerate our digital transformation and reaffirm our societal engagement. The guiding principle of our Group – “working every day in the interest of our customers and society” – proved to be a key strength and a powerful driver in our daily work.

In 2021, we launched our first Ideation Challenge, an important milestone of our innovation road map. The Ideation Challenge has allowed employees to share their ideas for improving both client and employee experience. So far we have developed, within our Innovation lab, five brilliant ideas that originated from our colleagues.

We have also strengthened the diversity practise. We launched an ambitious internal development programme to provide career-mapping tools to talented young female colleagues. We included a mentoring programme to support female employees in their professional and personal development within the Bank.

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

Indosuez’ teams are all composed of multilingual specialists who offer a comprehensive product range and provide a global investment strategy with a high degree of customisation for individual clients, including tailored solutions for the UHNW individual segment.

If we take the example of our award-winning Forex team. They are committed to implementing our company’s pledge through proposals that are rigorously selected for their real, quantifiable and sustainable impact.

In addition, our client service team is another key differentiator. We have made relationship excellence one of our major ambitions, with the aim of improving service quality and client satisfaction, and have adapted our organisation and our roadmap to meet the new expectations of our clients.

Our customer-centric approach has been improved even further this year, by the implementation of three enhancements: Online banking solutions, a new lifecycle management tool developed with Wealth Dynamics and our investment proposal solution in partnership with the Swiss fintech Evoq.

Has morale among your colleagues held up well during the pandemic? What have you done to bolster their spirits?

We have been able to reinvent the way we relate to and operate with our employees and to supplement the usual communication system, which they have greatly appreciated. For example, we organised numerous conferences to keep them regularly informed about the progress of the company project. At the same time, numerous initiatives were launched to encourage entrepreneurship and to acculturate all employees to the challenges of innovation.

Indosuez has also developed a Digital Academy with training courses on subjects ranging from foreign languages to personal development tutorials and managerial training dedicated to remote management.

What lessons have been learnt that can be carried forwards?

Over the past two years, there have been countless lessons learnt throughout the pandemic. Despite a demanding environment, our ability to build together has once again proven valuable in a large number of projects. One of the main lessons is that our personalised offering, and close relationships with our clients, is more important than ever.
Explore our periodic table of digital financial apps.

Winners of the WealthBriefing Swiss Awards 2022

Best CRM System

7,000+ User Experiences with our Ever-Expanding Library of Apps

Client Communication, Automation and Management

Digitizing Data into Information

Performance Measurement, Attribution and Risk

Mass Automation for Trading and Accounting
What sets you apart from your peers this year and why?

2021 was a great year for us. The year culminated in the release of InvestCloud X, combining the best of InvestCloud’s significant communication, planning and financial product shopping solutions, including CRM. We’ve also been tremendously successful in harnessing our deep expertise in AI and Machine Learning. One example of this is our AI code generator iProgram that enables programs to write programs and therefore enables no-code user journeys to be assembled in 3-6 months. Another example is our ground-breaking Next Best Action offering, using our Client Analyze and Research Analyzer engines and natural language processing. We have helped clients improve client engagement, communication and planning through delivering advanced client portals, holistic client lifecycle management solutions and portfolio optimisation – solutions which have been adopted by several wealth managers in Switzerland, the UK and across Europe and Asia. And all this on a single, cloud-based platform that can be configured flexibly using our ever-expanding library of digital financial apps. InvestCloud’s App Store offers over 300 apps today. And with over 550 clients and over $6 trillion in assets managed on our platform, adoption has been significant.

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

We have been fortunate to have been able to attract some great talent in the Swiss market, and we grew the size and talent of our teams in Zurich and Geneva significantly last year, to continue to serve key clients in a strategically important market. Our data science and quant team based out of Switzerland contributes significantly to our digital wealth solutions globally as a center of excellence.

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

We will continue to invest in research and development and work with our clients and partners to deliver and evolve our platform. We will also continue to deepen relationships within our ecosystem of alliance partners and industry analysts.

What have been the challenges you have had to overcome?

Just like the rest of the world has had to, we too have needed to adapt to different ways of working, taking into account (and respecting) the ever-evolving restrictions with regard to travel and the ability to have face to face meetings, either with clients, with prospects, or with colleagues. Putting our clients first, this meant early hours for some, late hours for others. We have worked tirelessly to bring the best of all practices, domains and local expertise together to deliver a comprehensive and adaptable platform to address client needs. All while continuing to add talent in a highly competitive market.

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

Because we are a digital technology company, we’ve always been ahead of the curve in terms of using video and remote collaboration technology to work with our teams around the globe. Through the pandemic, we’ve really been reaping the benefits of our own digital technologies to support our business and our clients’ businesses.

What lessons have been learnt that can be carried forward?

From a Swiss market perspective, two important lessons. First, that it’s key to have a deep understanding of the local market and strong local networks – which, with a very strong and ever-growing team on the ground in Switzerland we continue to do. But equally to combine this with access to and leverage of a broader, global network. The other is that while we thought Switzerland would be late in adopting cloud-native offerings, the opposite has proven to be true.
We are an investor services group that brings together that rare combination of global expertise with a deep understanding of the needs of family offices and private clients.

**Our expertise**
- Asset protection
- Succession planning
- Family office services
- Philanthropy
- Luxury assets
- Alternative assets
- Commercial assets
- Private funds

[www.iqe.com/private-wealth](http://www.iqe.com/private-wealth)

For information on the regulatory status of IQ-EQ companies, visit [www.iqe.com/legal-and-compliance](http://www.iqe.com/legal-and-compliance)
ACCESS, FLEXIBILITY AND RESPONSIVENESS: THE IQ-EQ SUCCESS STORY

Serge Richard, Managing Director, and Frederique Meyer, Deputy Managing Director, of IQ-EQ Switzerland discuss the makings of a winning team.

IQ-EQ is a leading global investor services group that offers a comprehensive range of fiduciary, administration, compliance, reporting, asset and advisory services to private clients, family offices, multinational companies and fund managers worldwide.

In Switzerland, we specialise in fiduciary, corporate and related administration services. Our teams in Geneva and Zürich are highly agile and focused on delivering a truly tailored service. Within the private wealth sphere, we provide services to suit every stage of a client’s wealth planning, succession and management strategy.

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

We stand out from our peers because of our long-term experience, accessibility, flexibility, and responsiveness. Our Wealth Planning team in Switzerland has an experienced, talented and fully committed unit who enjoy going the extra mile to achieve client satisfaction in a high touch, compliant and efficient manner.

Part of our expertise lies in knowing people and knowing solutions that are tailored to individual clients. Our excellent client services provide expert solutions by getting to know the people behind the business.

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

We are adept at adapting, as seen in our 2021 client listening programme, which encouraged direct feedback in order to stay ahead. Our clients and their advisors want the experience of a truly independent and boutique-style firm, with a hands-on approach and services that are attuned to their individual needs, but with the security, governance, ‘bench strength’ and infrastructure of a global group. This framework has been successful to us so far, and we intend to remain razor-sharp in our high standards and practices.

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

Our business model has proved extremely resilient during the pandemic, and we have been fortunate with substantial growth over the past two years - with more to come in 2022. Thanks to the close relationships we have built and nurtured with our clients, their family offices, advisors and other intermediaries, the transition to virtual meetings and working from home was very smooth. On this front, we have benefited from the group’s solid IT infrastructure and a highly responsive team.

What lessons have been learnt from the pandemic that can be carried forward?

The biggest lesson is that we should never expect tomorrow to be the same as today. This pandemic has also demonstrated how quickly the whole world could adapt to an unforeseeable situation. From a business perspective, the lesson is that there’s always an opportunity behind a problem.

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

Wealthy people tend to think more about structuring their affairs in a troubled world, so wealth management has a great future. The complexity of our business enhanced by ongoing new regulations only make our business more interesting and more sophisticated, hence more motivating when you’re not afraid by change and the challenges change brings.

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

This prestigious award will help to raise our profile in the local market in Switzerland and boost our credibility with institutions who are not necessarily working with us yet and reinforce our image through our existing network. We love sharing our wins with our clients and seeing the team’s work pay off.
Leo Trust was founded in Zurich and quickly became the market leader in the areas of planning, formation and management of corporations. Today, an interdisciplinary team of trust officers, trustees, tax experts, lawyers, controllers and asset managers work here. Thus, our international clients are efficiently advised and practically supported in all aspects of taxation, estate planning, asset structuring and in the incorporation as well as administration of companies.

Leo Trust Switzerland AG has been an owner-managed and globally active financial company for over 40 years, offering a wide range of services for institutional and private clients.

www.leotrust.ch
LEO TRUST’S STAFF SET THE BAR HIGH, ADAPT RAPIDLY TO CHANGE

Dr. Roderik JP Strobl, Relationship Manager for Key Clients, Leo Trust Switzerland, talks to Tom Burroughes, Group Editor at WealthBriefing, on his firm’s achievements.

With headquarters in Zurich and offices in Lugano, Nicosia and Panama City, Leo Trust Switzerland has been serving its clients since 1980. We have a tradition of providing bespoke high-quality fiduciary services to our clients based on our long-standing expertise. Our innovative and forward-thinking strategy places us as one of the leading pioneers in crypto-related estate and wealth planning services. Leo Trust’s staff of about 50 employees handles more than 4,000 corporate entities, private and institutional client mandates and trust structures in numerous jurisdictions.

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

Our staff. Their unique expertise as long-standing practitioners in the field is pivotal. Furthermore, Leo Trust adapts to the latest developments in corporate services, working with leading experts to develop innovative yet compliant services such as asset protection structures using advantageous jurisdictions. Leo Trust’s track record of over 40 successful years in the industry recommends it as a trust-worthy partner for long-standing business relationships. Our processes are centred on client needs, reducing internal bureaucracy, and promoting true client centricity. We use resources such as in-house senior trust officers, dedicated relationship managers, lawyers, accountants and compliance professionals. This strategic advantage allows Leo Trust to proactively provide services in an efficient and competent manner. We consider each client’s individual needs and review their needs and analyse how these needs can be best met. Leo Trust has access to the latest technological trends and market developments around the world, putting it ahead of its competitors.

Leo Trust distinguishes itself from its competitors by offering compliant cryptocurrency services by using state-of-the-art software to track and verify transactions. This software is equivalent to that used by banks and exchanges. Leo Trust is one of the first independent trust companies to embrace such advanced technology.

We encourage our employees to contribute their own ideas through an open and innovative process and provide internal training led by qualified experts. We search for client added value that no other trust companies address. Unlike many of our competitors, our remuneration system includes numerous soft factors, fostering cooperative teamwork based on fairness.

Leo Trust is family owned and is family-orientated and immersed in the ‘learning organisation’ proposed by academics such as Peter Senge.

How has Leo Trust’s business (model) adapted to the pandemic?

We use agile systems and workflows that can adapt quickly. This enables our business model to remain fluid and client-focused. For instance, home office came naturally to us because we already had the IT in place to enable secure remote data access. Leo Trust ensures that its employees stay informed about the latest market developments by using a tool whereby current knowledge is centralised and accessible from anywhere, a true application of the concept known as the ‘learning organisation’ proposed by academics such as Peter Senge.

What is Leo Trust going to do to master this challenging environment?

Leo Trust has grown in this challenging environment. The right people, supported by state-of-the-art IT systems, are in place to address client issues. We are agile and this allows us to master any challenge which comes our way. In addition, we have an extensive network of friends, partners and clients who help us just as we help them when they need our bespoke services.

Whom do you look to for inspiration and ideas?

We are inspired by our clients and other stakeholders. Based on open and constructive communication, Leo Trust receives requests from existing clients daily, many of which are the source of inspiration for new services.

1. A perfect example of how Leo Trust combines tradition & innovation is … knowing our clients’ needs and using innovative software and well-established digital processes to deliver top quality services.

2. Leo Trust’s truly client-centric and trust-based strategy means … our clients come first. We are their anchor in these turbulent times.

3. The best way to describe excellence in Leo Trust’s workday life is … simply a happy client.

4. Let me show you how our clients benefit from our commitment and interdisciplinary team … Leo Trust provides you with just about everything you need for successful wealth planning.

5. Holistic is not a question of our prestige, it’s … for us, the norm, and describes how we approach our clients’ needs daily.

Dr. Roderik JP Strobl
Relationship Manager for Key Clients,
Leo Trust Switzerland
FINDING TALENT THAT SEES THROUGH TODAY AND TOMORROW
HELPING CLIENTS POSITION FOR ENDURING SUCCESS

Benoit Schroll, Director at Lexton Stanley, talks to WealthBriefing’s Tom Burroughes on how his recruitment firm has set high standards.

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

At Lexton Stanley, every client is important, and each engagement is unique. We are known for working closely with clients to understand their goals and objectives, challenge their thinking, offer solutions that ensure the right professionals are discovered to achieve success.

Our expertise is both broad and deep. Every Partner at Lexton Stanley has deep sector and functional expertise supported by local and global knowledge.

Our collaborative teeming results in conversations that define the bigger picture - the impact of economic policy and geopolitical factors - balanced with client needs and objectives regarding operational and leadership needs and solutions.

These strengths bring clarity to the complex challenge confronting our clients: having the right talent, in the right place, at the right time.

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

Develop Partners tailor Lexton Stanley global resources and specialist expertise to client’s organisational, leadership and talent priorities.

Develop key performance and client service metrics to inform on everything we do, from global teaming and key account management, to enhancing our own sector expertise, leadership insights and client collaboration and service.

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

We find and assess professionals in middle and upper management - for single or multiple roles. We help to pinpoint the candidates with the best chance of being a successful long-term fit for our client business.

We constantly challenge our methodologies to go deeper and deeper and be the most accurate tool for our candidates and clients.

We must continue to develop tool for the assessment of business plan, hard skills, soft skills to continue our goal, faster and better deliveries.

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

The pandemic has obviously had an impact on our company. We had to adapt directly by promoting working from home and increasing the use of video conferencing.

We continue to offer working from home today because we have noticed that the people affected feel better and are therefore in better conditions to work.

What lessons have been learnt that can be carried forward?

We believe that trusting the people we work with is key and that we need to focus on dialogue and well-being at work.

Whom do you look to for inspiration and ideas?

We are inspired by our counterparts through constructive collaboration that allows us to have an optimal understanding of our fields of intervention and to fulfil our mission.

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

We don’t have any expectations. What is important to us is to be able to continue to improve every day and to offer a quality service to our partners.
“Securing family legacy means preparing the next generation.”

H.S.H. Prince Hubertus von und zu Liechtenstein,
Member of the Foundation Board of LGT Group Foundation since 2021

lgt.ch/values
UNIQUE OWNERSHIP AND BIG FOOTPRINT AT LGT BANK

Tom Burroughes, Group Editor at WealthBriefing, interviews Heinrich Henckel, CEO at LGT Bank Switzerland.

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

LGT has had multiple locations in Switzerland for almost 20 years. Today, it serves domestic and international clients from its branches in Zurich, Basel, Berne, Geneva and Lugano. Over the past decade, LGT has experienced strong growth in Switzerland, both organically as well as through selected acquisitions, such as Dresdner Bank Switzerland in 2009 and a Private Banking Portfolio of HSBC in 2014. Over the last 8 years, LGT has more than doubled its assets under management in Switzerland, which have grown from SFr19.4 billion in 2013 to almost SFr50 billion today.

One of LGT’s most distinct characteristics is its unique ownership structure. The leading international private banking and asset management group has been fully controlled by the Liechtenstein Princely Family for over 90 years. This set-up provides a high level of stability and plays an important role in LGT’s strategy as well as its values, such as respect, continuity and entrepreneurial thinking. As of 30 June 2021, LGT Group managed assets of SFr275 billion for wealthy private individuals and institutional clients.

At LGT Bank Switzerland, we combine LGT’s unique characteristics with first-class Swiss private banking and serve as a values-oriented and reliable partner across generations.

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

We take a holistic view of our clients’ needs, covering topics like investment advisory, portfolio management, lending, strategic wealth planning, but also more specific needs such as philanthropy advisory and family advisory services.

In line with our owner’s values, which include long-term thinking and taking responsibility for our environment, we want to continue to create value for our clients and society. For over 20 years, we have been committed to sustainable solutions in the financial industry. In Switzerland, for example, we introduced a portfolio management solution with a focus on sustainability three years ago. We are now working on transforming all our traditional portfolios into basic ESG portfolios that will serve as a standard offering for our clients in the future.

Last year, we committed to reducing our net emissions to zero by 2030. By taking this step, we are once again underscoring our commitment to the Paris Agreement and a sustainable financial sector. LGT recently also launched a cooperation with Climeworks. We have signed a ten-year agreement with this Swiss company, which will remove 9,000 metric tons of CO2 from the atmosphere on behalf of LGT during that time. LGT is the first bank to conclude an agreement of this magnitude.

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

Our colleagues, not only in Switzerland but worldwide, cultivate our owner’s values, such as respect, a sense of responsibility, discretion and integrity. These are key success factors when serving a demanding private banking clientele, and help to foster strong bonds, which are especially helpful as we navigate the pandemic. In these more difficult times, we continuously provided our clients with the high-quality service they are accustomed to.

Consequently, we delivered a strong half-year result in 2021 despite the difficulties in the market. Clearly, this was possible due to the bank’s strength and long-term perspective and thanks to the hard work and commitment of our colleagues all over the world.

“At LGT Bank Switzerland, we combine LGT’s UNIQUE CHARACTERISTICS with FIRST-CLASS SWISS PRIVATE BANKING and SERVE as a VALUES-ORIENTED AND RELIABLE PARTNER ACROSS GENERATIONS.”
This is our decisive moment. For CO₂, time is up. For every single company, every single industry. It’s time to transition to a post-carbon world. It’s net zero everything. Or nothing. Time to get ahead. Or get left behind.

It’s why, with a holistic, scientific perspective, our Net Zero Investing Strategies can analyse and decarbonise entire portfolios. So our clients can benefit from the industry leaders preparing for the economic impact of a net zero transition.

Not tomorrow, but today. Because net zero isn’t 30 years away. Net zero is now.

Find out more about our Net Zero Investing Strategies at LombardOdier.com

Investments are subject to a variety of risks. You should consult your investment advisor before entering into any transaction.
What sets you apart from your peers this year and why?

Thanks to our strong balance sheet and entrepreneurial, long-term approach, we have seen excellent growth in new Swiss domestic clients. The new clients who chose Lombard Odier are an endorsement of our proposition.

In view of our growing client base of entrepreneurs, self-employed professionals and managers in Switzerland, we have created a comprehensive, step-by-step approach for this client group – our 'Rethink your wealth architecture' initiative.

We have also revamped our approach for charitable foundations, associations and federations, with a clear focus on sustainable investment mandates and reporting services, so as to make our offering broader and more transparent for the benefit of board members and decision makers.

Our robust proprietary banking platform and technology infrastructure enable us to maintain close contact with our clients and provide seamless digital services. In 2021, we added new features to our client e-banking interface, launching payment, transfer and digital signature functionalities.

We have also initiated a number of large-scale sustainability projects. After the successful launch of two sustainable strategies in 2020 – Climate Transition and Natural Capital – we enhanced our sustainable investment framework with new science-based tools in 2021. Our attendance and engagement at the COP26 in Glasgow in November and at the Building Bridges event in Geneva in December are also notable. Finally, our Senior Managing Partner was named President of Swiss Sustainable Finance last summer.

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

The teams in all five of our Swiss offices put in a solid performance in 2021, boosting our overall results and showing a high degree of engagement. Client service and interaction remain paramount in these troubled times.

Our investment specialists continued to focus on essential ideas beyond the pandemic. As it was again tough to meet physically during the year, we also continued our series of webinars, in order to keep debating new ideas and discussing our views with our clients.

As an expert in managing pension assets held through segregated pension accounts for the sole benefit of (U)HNW individuals, we are increasingly gaining recognition for our management of vested benefit assets and our non-compulsory pension plan. Pension asset management now accounts for just under SFr2 billion of assets – a 30 per cent increase in one year.

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

We will continue to listen closely to our clients’ wishes and expectations, while also identifying sources of significant added value, particularly in areas such as private assets, sustainable investments and asset and liability management (ALM) strategies. For us, all performance must be measured net of costs and taxes. In the interests of efficiency and transparency, our value proposition reflects this emphasis.

We are determined that clients will have a positive experience in all their interactions with us, whether they speak to a person or use our technology. We continue to invest to ensure we meet the highest standards and deliver excellent service.

What have been the challenges you have had to overcome?

In our position, it is important not only to deliver top-class wealth management solutions, but also to constantly question our approach, to innovate and to explore new options. Creating new, alpha-generating strategies in the sustainable field is not easy, since this space is becoming crowded. Our approach is highly sophisticated and has been developed in collaboration with scientists in the field.

Whom do you look to for inspiration and ideas?

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

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

In troubled times, people long for stability and resilience. Our bank represents strong values that inspire safety and trustworthiness and is often seen as a safe haven in this sector.

This prize rewards and acknowledges the hard work put in by our teams and is an endorsement of our strategy.
Cover your whole client lifecycle with New Access solution suite

Request a demonstration by contacting us through www.newaccess.ch

Core-to-digital Solutions for Private Banking & Wealth Management
NEW ACCESS: COMPREHENSIVE FRONT-END SOLUTION FOR WHOLE CLIENT JOURNEY

Ludovic Balacé, Head of Presales and Marketing at New Access, explains why his firm has set high standards and continues to push forward.

For the past 20 years, New Access has been servicing disruptive and innovative solutions to more than 60 clients around the world. But most importantly, it is a Swiss roots company providing agile and scalable core-to-digital solutions dedicated to the private banking and wealth management industries.

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

The trend we have witnessed for the past 10 years and its acceleration during Covid brought our solutions even more into the light. We started a few years ago to work on the digitisation of the Banking and Wealth Management processes and we have invested in that direction ever since.

As part of our core-to-digital solution suite, we believe our Client Lifecycle Management Digital Platform - Banker’s Front solution - to be key for the relationship managers. Its centralised banking cockpit offering a 360° view and allowing the clients to always be at the centre of the solution stands out from the other players in the software industry and is, for the second year in a row, recognised as most innovative client solution on the market.

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

We will continue to do what we have been doing for the past 20 years: invest in the key areas where our clients expect us to help them (digitisation, Artificial Intelligence...) while maintaining the highest possible level of services. Sustainable innovation is key here, which means focusing on the relevant developments while staying on the course keeping our trajectory.

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

New Access rely on more than 200 collaborators across the world that have showed an extraordinary resilience to the context changes. It is true for the whole software industry, but it is always more complex to handle a digital or core transformation without being onsite with our clients.

Our CEO, Vincent Jeunet, has really kept us together when he joined New Access early 2021. We are all looking in the same direction with a common goal, ready to improve ourselves and deliver the best services to our clients.

What are the prospects for wealth management in the future?

It is clear that the digitisation trend that started a few years ago is only going to intensify. If the market only expected software to be digitized, it is now expecting processes and workflows to follow that path.

This trend is really key to understand the future of wealth management as it directly impacts the way Private Banks and Wealth Managers will interact, not only with their clients but also internally, within the bank.

Firstly, from a client relationship point of view, we expect the private banks and wealth management industries to have a need for more proximity with the end-user. The client base is going to be younger and will require to access the bank by itself, anytime and anywhere.

Secondly, companies are going to digitize their internal processes, to avoid emails, shared folders, papers, etc. and ultimately replace those by digital workflows. They also are going to require decision support systems through client targeting (Data Analysis) or asset/portfolio management guidance (investment suggestions, buy/sell signals).

To conclude and illustrate this upcoming trend: by digitising the private banks and wealth management systems, software providers such as New Access built what could be the “house foundations”; we are now building the “house” by bringing intelligence to those systems.

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

An award, especially from a respected actor such as WealthBriefing, is for us a true recognition of the work we have done, spreading the word that we deliver high quality solutions.

Focusing on this particular accolade ‘Most Innovative Client Solution’, it also tells us that we are going in the right direction, and we must keep this momentum going.

Ludovic Balacé
Head of Presales & Marketing
New Access
Tools & Analytics for Advisory

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

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

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

[www.prometeia.com](http://www.prometeia.com)
Carmine Cammarota, Country Head Switzerland, Prometeia, talks to Tom Burroughes, Group Editor at WealthBriefing, on the success of the firm.

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

Prometeia has a series of advantages, many of them stemming from always having catered our WM front office products and services closely to our clients’ needs. This has only been possible through having close, long-term relationships with our clients which allows us to understand those needs and how best to meet them. These relationships are, in turn, invariably driven by clients’ trust in our people, who earn it by being smart, client-focused wealth specialists, able to develop innovative solutions using the most appropriate technologies.

We’ve been building advanced wealth management front office solutions, and providing market data and analytics data feeds, for decades now. More than 100 financial institutions take advantage of our modular, FinSA compliant, sophisticated tools, leveraging them to serve their clients better and more efficiently. These days we’re supporting the management of more than SFr2.5 trillion in assets across tens of millions of portfolios. And through our software’s flexibility and customisability we’re able to match our clients’ needs precisely, allowing them to differentiate from their competitors too.

Those are some of the things that make us different.

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

Well, as I mentioned above, we are our people, and our success is built on the hard-work and talent of our 1000 employees. We are all highly specialised and experienced in our industry, and focused on our clients’ success above everything. To best satisfy our clients’ needs, we have created a working environment where people are constantly motivated to become innovators in both thought and actions and entrepreneurs in spirit. We have thus built a reputation for innovation throughout the market and are able to transform the present with our new and creative solutions to ensure the future belongs to our clients.

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

Innovation is more important than ever in today’s world and it is firmly carved into Prometeia’s DNA. To stand out in a crowded market we invest heavily in the research and development of cutting-edge methodologies, technology and multi-disciplinary, agile and entrepreneurial teams. This has allowed us to quickly adapt our solutions to changing regulatory, business and competitive contexts. A good example is ESG and AI, where we have a series of exciting components to offer. Innovation is a differentiator and our customers, and the entire industry are watching.

Maintaining our competitive edge is a major priority and that is why innovation is embraced at every layer of the company and is a fundamental part of our strategy.

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

Prometeia’s key differentiators have only grown in importance since the onset of the pandemic and continue to be the driving forces of the business, both for this year and the future. As we help our clients adapt to the changing environment, we are continuously developing new state-of-the-art modules, analytics, data feeds and innovative user experiences. Our tools have been key in helping relationship managers give sustainable, compliant, personalised advice to their clients, even when face-to-face contact has been restricted.

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

This recognition is an important acknowledgement of our constant development and innovation. It also confirms that we stand out among our peers in Switzerland, where our footprint is quickly expanding, further increasing our profile and helping to drive our business further. We hope that receiving this award will strengthen our position in the Swiss market & increase the number of financial institutions that consider us when updating their front office systems and market data and analytics.

Carmine Cammarota
Country Head Switzerland, Prometeia

“THIS RECOGNITION IS AN IMPORTANT ACKNOWLEDGEMENT OF OUR CONSTANT DEVELOPMENT AND INNOVATION.”
What sets you apart from your peers this year and why?

Putting our clients and their needs at the forefront of everything we do is central to our shared success. Just as our clients come from diverse backgrounds, their requirements also vary. No two clients are the same, and for that reason REYL provides a tailored and bespoke approach.

It is thanks to REYL’s five distinct business lines (Wealth Management, Entrepreneur & Family Office Services (EFOS), Corporate Finance, Asset Services and Asset Management) that we can consistently provide solutions to each unique situation. Our clients also benefit from our international footprint, with offices across Europe, the Middle East and Asia.

REYL has experienced enormous success over the years and we recently celebrated our nineteenth consecutive year of assets under management growth, and our team has grown too. Despite this, our client-first philosophy has always been consistent and lies at the heart of what set our team apart.

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

The REYL team are essential to our success. Ever since we were founded in Geneva in 1973, we have carefully nurtured our company culture to encourage entrepreneurialism and team spirit. Our colleagues are empowered and approach our work as a partner, rather than an employee, which allows them to explore new ideas, and come up with some of our most innovative solutions on behalf of our clients. Cognitive diversity is key to fostering the exchange of ideas and we are pleased that our team, which has grown every year for 16 years, is represented by 25 different nationalities.

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

REYL is constantly innovating and evolving to not only meet our clients’ needs and expectations, but to also move ahead of the crowd to anticipate the services and solutions that they will require. We will continue to innovate and build on our recent strategic initiatives, such as our engagement with Alpian, a 100 per cent digital private bank, serving wealthy clients residing in Switzerland.

We are mindful that the world we live in faces critical climate and social challenges, and we firmly believe that the financial sector has an important role to play to guide, inform and advise clients on sustainable investments. In order to do this, REYL set in motion a plan to build unparalleled levels of expertise across its business, and 2019 saw the launch of REYL’s impact investing affiliate, Asteria Investment Managers. Further reinforcing its depth of expertise, Asteria has partnered with Swiss impact private asset manager Obviam to form a unique and prominent entity in the Swiss impact investment ecosystem.

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

Being entrepreneurial often means going against the grain, and we are always challenging both ourselves and the status quo. As our industry undergoes perpetual change, we understand that complacency is simply not an option.

Our business’ size, structure and financial solidity allow us to stay agile and highly responsive to our clients’ needs as well as to market developments and successfully overcome any challenges that emerge.

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

Over recent decades, the REYL Group has continually grown and developed into a leading player in the banking sector. Our recent strategic alliance with Fideuram-Intesa Sanpaolo Private Banking has strengthened our institutional framework and allowed our business to increase its presence in international markets. We are delighted to be recognised in these awards, and this serves to further underpin the many reasons why our clients choose to work with us.

We have been advising families with significant wealth for over 200 years, transforming success and innovation into a legacy for future generations.

Our unique, long-term perspectives are rooted in the depth of our experience and our unrivalled worldwide network of expertise in over 40 countries around the globe.

rothschildandco.com/insights

Image: Brass Balances

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

Courtesy of The Rothschild Archive.
What sets you apart from your peers this year?

We focus on a distinctive and long-term investment approach combined with exceptional, personalised client service. Furthermore, access to the expertise and resources across the Rothschild & Co group offers significant added value for our clients as they can also benefit from our Merchant Banking, Global Advisory and Asset Management capability depending on their individual needs.

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

Our business model, with its long-term perspective, is always a very resilient one and our clients particularly valued this during the pandemic. Of course, we had to use more digital channels than before, and we were ourselves were working from home. This element will remain as part of our future “agile” working model and we will further strengthen our hybrid approach to advising clients, combining very strong personal relationships with “best-in-class” digital solutions.

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

More than ever. With only 25 clients per advisor, our bespoke, highly transparent and timely advice helps us in fostering strong and trusted relationships with clients and collaboration that often endures across multiple generations.

The pandemic demonstrated that this, and the effort we put into exceptional client service, is highly valued by clients - more than half of existing clients increased the share of their wealth with us.

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

Winning an award like this is always the outcome of an amazing team that works together to achieve excellence. Our client advisors and our investment teams did a fantastic job in 2021 by consistently outperforming our peers.

They were supported by our global network, which specialises in the needs of international clients, facilitating cross-border investments and providing global investment views.

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

We deliberately keep our focus on only a few target markets where we have a deep understanding of all the relevant influencing factors and a good local network of experts. Despite the general pressure on margins, we also continue to invest in very personal and long-term client relation-ships. We’re also continuously expanding our “open-architecture” product platform and in-house expertise across all asset classes and, in particular, with our in-house private equity, private debt and co-investment capabilities.

The latter really sets us apart from most other banks. Of course, we also continue to invest into new digital solutions to further improve our clients’ access to our services and investment information.

Whom do you look to for inspiration and ideas?

There would be a multitude of great personalities who have taken on a lot of responsibility and mastered challenges in their lives. At the moment, however, I am impressed by the medical nursing staff in the hospitals.

For almost two years, they have been working under enormous pressure, are overtired, have to make difficult decisions every day and, for the most part, remain positive. They are driven by intrinsic motivation and want to help their patients. That is great!

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

Our aim is to consistently offer the best service for our client’s needs and winning this award will encourage us to work even harder to do so.

Receiving such a renowned award recognises the teams’ hard work and demonstrates that we are always striving to deliver best-in-class service, something which we hope is compelling for new and existing clients alike.
Private Wealth

A dynamic approach for durable solutions

Our Private Wealth Group covers the full range of private wealth legal issues. We advise individuals, families and closely-held family businesses as well as banks, family offices and trust companies in estate and wealth planning matters, and represent them in estate and trust litigations.
DELLIVERING FULL-SERVICE EXPERTISE FOR SOPHISTICATED CLIENTS

Andrea Dorjee-Good and David Wallace Wilson, Partners of Schellenberg Wittmer, talk to Tom Burroughes, Group Editor, WealthBriefing.

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

Schellenberg Wittmer’s Private Wealth Group covers the full range of contentious and non-contentious private client legal issues. We have particular expertise in cross-border estate and succession planning, wealth structuring and business succession and also regularly represent prominent, international names in complex and significant trust and estate disputes. Being one of the leading full-service law firms in Switzerland allows us to cover the full range of our client’s legal needs (in co-operation with our colleagues from other practice groups including in particular real estate, art and corporate law) and to benefit from an excellent international network.

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

Excellent team work is crucial for providing our clients with efficient, precise, timely and tailored solutions. Each and every colleague within our Private Wealth Group but also in our other practice groups have played an important role in achieving this goal! We consider it essential for our practice to share and constantly develop our knowledge and to combine the expertise from the different team members in order to provide our clients the best advice.

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

We closely monitor the legal, political and social trends and developments in Switzerland and abroad to keep abreast of the times; several team members are also actively engaged in shaping future regulations, such as the introduction of a Swiss trust law. In addition, we are very active in professional associations such as STEP and SATC, which allows us to maintain a regular exchange with our peers, the academic world as well as the public administrations and governmental bodies.

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

One of the biggest challenges in the private client field has been and will be to cope with the pace of changes affecting our clients, both on a national and international level.

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

There is no doubt that the pandemic did have and still has a great impact on the global economy but also on our and our client’s personal lives. Especially at the beginning of the pandemic, we saw an increased number of enquiries and instructions in the field of estate planning, including in particular wills, lasting powers of attorney, trusts and tax planning; while we are currently witnessing a trend of increasing trust and estate disputes.

What lessons have been learnt that can be carried forward? Plan ahead and stay flexible!

Has morale amongst your colleagues held up well during the pandemic? What have you done to bolster their spirits?

Luckily, we have so far managed quite well to navigate through the pandemic, both as a team and as a firm. The fact that we have all been facing similar challenges during the pandemic did probably even strengthen the cohesion among our team. Regular virtual team events and video calls helped to stay in touch and to keep the spirits up!

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

We are very grateful for receiving this accolade and at the same time proud that the continuous efforts and commitments of our team to provide first class services have been rewarded. It gives us confidence that we do the right things in the right way to best serve our clients.
From Geneva and Zurich, our private bankers are mobilised to offer you tailored advice and solutions. We thank our clients for their trust.
BIG OPPORTUNITIES FOR PRIVATE BANKS THAT STAND OUT

Franck Bonin, Chief Executive Officer, Societe Generale Private Banking Switzerland, talks to WealthBriefing Group Editor Tom Burroughes.

In your view, what are the underlying trends for the Wealth management industry, especially in Switzerland?

Switzerland remains a key financial center for wealth management and as such a pillar of the Societe Generale Group's European private banking network. It is a market where we are firmly established, with a long-standing presence, with real development prospects, both for individual clients and independent asset managers.

As for the way we conduct our business, it must consider and reflect the society at large, and its expectations. I meet and talk with a lot with our clients, and I am convinced that they increasingly want to give a meaning to the management of their assets, to have a positive impact and to be part of a sustainable future. It is up to establishments like ours, with environmental and social responsibility at the heart of its “raison d'être” and business plan, to accompany them along this path. And to help them move from an approach based on conviction to one based on commitment.

A fundamental market trend is the upside that players like us will get from offering their clients, whether individuals or independent asset managers, a differentiating and sustainable value proposition.

How is this reflected in your commercial and financial performance?

In line with the group’s very good results, our private bank demonstrated a solid performance in terms of new assets under management in 2021. SGPBS made a very positive contribution to this growth. The commercial momentum from our Geneva and Zurich offices is strong, with net inflows up by almost 10 per cent excluding market effects, which places us favorably in our competitive environment. 2021 was a very good year for us.

What are your strategic priorities for the coming years?

Our strategy is to focus on serving a sophisticated ultra-high net worth clientele to which we can provide a high level of expertise and dedicated solutions. In Switzerland, we are very attractive to this type of clientele because we combine proximity and high level of service with the expertise of a leading international financial institution.

From Switzerland, we also wish to develop our international clientèle with a selective approach in terms of markets: UK non-domiciled residents, Middle East, Russia where Societe Generale is the leading foreign bank in the country with Rosbank. We also have a representative office in Montevideo, which allows us to serve clients in Latin America.

Business with external asset managers accounts for around 40 per cent of your activities in Switzerland. Is this percentage likely to change?

Independent Asset Managers are an important client group for Societe Generale Private Banking Switzerland, and we consider this segment as one of the key elements of our growth strategy. The managers for whom our service offering and investment solutions are most relevant are those of significant size who have chosen to remain asset managers in the long term within the framework of the new regulations (LSFin).

This approach is in line with what our institution offers in terms of services and dedicated solutions, such as our advisory solution which gives them access to a transactional platform with an advisory dimension on OTC/derivatives/structured/Forex...

What is your philosophy regarding digitalisation?

For us, digitalisation is not an end in itself but a means to improve clients’ experience, particularly in terms of execution, electronic signature of documents, account onboarding, etc.

As part of a partnership with Azqore, we will be deploying new solutions this year that will further enhance our customers’ digital experience. The challenge in this area is to reconcile operational efficiency with the ability to always offer a high quality and customised service.

At the same time, I am convinced that the wealth management business will retain a very strong personal touch, based on the human relationship.

“OUR STRATEGY IS TO FOCUS ON SERVING A SOPHISTICATED ULTRA-HIGH NET WORTH CLIENTELE TO WHICH WE CAN PROVIDE A HIGH LEVEL OF EXPERTISE AND DEDICATED SOLUTIONS.”
Deliver the portfolio performance and service quality your clients demand, with SS&C Advent’s sophisticated front-office technology and enhanced communication capabilities.

- Automated onboarding & bespoke reporting
- Full adviser & client portal functionality
- Portfolio construction, model management, rebalancing & order creation

Designed to help wealth managers navigate today’s fast-moving markets.

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Winner - Best Front Office Solution
WealthBriefing Swiss Awards 2021
Marc Schwarz, Sales And Business Development Director at SS&C Advent, talks about his firm’s qualities to Tom Burroughes, Group Editor of WealthBriefing.

What sets you apart from your peers this year?

Continued innovation and growth, as we keep pace with the market where focus is shifting to the front office as the next frontier of productivity enhancement.

SS&C Advent continues to innovate with integrated solutions covering the entire investment lifecycle, enabling wealth managers to maintain higher client-advisor ratios, attract and retain the best talent, and boost their profitability.

Our breadth of business lines, and our global scale aligned with our local presence in all of our key markets, allows us to bring multiple benefits to our clients, unmatched by other vendors.

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

SS&C Advent has a diverse and multi-skilled team, spread across our geographical spread. Collaboration is key to our success. We utilize technology and culture to optimize collaboration and empower teams to drive the business forward.

We continue to grow our client base across Europe, as well as APAC. This year we forged a strong partnership with a leading investment manager to provide best-in-class adviser experience and client service through technology and innovation.

Our dedicated teams are composed of seasoned professionals with a wealth of experience in technology implementations and management, along with front-line knowledge of local regulations, industry practices and evolving market trends.

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

Continue to demonstrate a client-centric company culture. We are guided by principles which drive our ongoing success: Commitment to our clients, Taking Ownership, Inspire Teammates and Innovate Intelligently.

Our growth is fueled by teamwork. As a company, we reward innovation and professionalism. To quote one of our employees: “Our customers rely on us to keep them at the leading edge of technology and services so they can provide better services to their clients”.

What have the challenges been in obtaining excellence?

Technology and services are constantly evolving and it is vital we continue to innovate in order to stay at the leading edge and remain a competitive force in this industry. With such diversity in local regulatory requirements, market practices, instrument types and client expectations, a key challenge is to ensure our products and services have the flexibility and specialization to cope with all these different market demands.

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

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

At SS&C Advent we are constantly inspired by our clients who continue to keep us at the forefront of the industry. We also keep a keen eye on technologies that influence and improve the client experience, and continually strive to deliver technology and services that bring constant and incremental improvement to the client’s operations, effectiveness and efficiency. We also invest in understanding the views of the key industry influencers and industry groups and are regular participants in events and discussions across a wide range of industry issues and ongoing challenges.

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

Winning the best ‘Portfolio Management Solution’ in the region reinforces our capabilities and demonstrates our commitment to continued digital success for our customers.

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

As a well-known and respected publisher within the wealth industry we will use this recognition as a proving point for our capabilities. It is invaluable to our staff, as well as our clients, to see our solutions validated and acknowledged by highly regarded third parties.
NOW AND FOR FUTURE GENERATIONS

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

STONEHAGEFLEMING.COM
DEEP CLIENT UNDERSTANDING AND FAMILY CULTURE AT STONEHAGE FLEMING

Jacqui Cheshire, Partner and Head of Family Office Switzerland, at Stonehage Fleming, talks to WealthBriefing’s Tom Burroughes.

What sets Stonehage Fleming apart?

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

Despite challenging conditions, Stonehage Fleming’s business has performed well, and we have seen significant growth, both organically and through strategic acquisition. In July 2021 the Group announced the acquisition of the Private Client Services business of Maitland, bringing legal, fiduciary, corporate and investment management capability in 18 locations worldwide. The transaction will also add a further £1 billion of assets under management, £15bn of assets under administration and almost 300 people globally. The firm made several senior appointments, including a head of estate planning in Luxembourg, further demonstrating our commitment to the growth of the business in Europe. Our continued expansion enables us to offer an unusually wide range of advisory, technical and operational capabilities that can help navigate even the most complex of circumstances.

How have your colleagues contributed towards the success?

The past couple of years have been challenging but our people, as ever, have remained resilient and continued to deliver the quality and continuity of service our clients expect. We operate as a “One Firm Firm”, working seamlessly together across services and geographies for the benefit of the families we support. This approach is fundamental to the success of our proposition, where our clients often have multiple touchpoints, for instance engaging with a relationship manager in Geneva, a trust officer in Neuchatel and a legal advisor in London.

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

We are recognised for building strong, long-term relationships with our clients and will continue to invest in the best people and technology. We work closely with our clients to adapt our service offering to meet their demands. In 2021 we introduced a new Swiss domestic offering for families and companies based in, or planning to relocate to, Switzerland.

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

At the start of the pandemic, we adapted quickly and moved to agile working. Recognising the fundamental changes in the nature of the workplace, in the summer of 2020 the Group decided to move to a ‘3-in-5’ policy, ensuring that the culture of the business is preserved through in-person engagement, whilst acknowledging the benefits of flexible working.

As an international business, we were already accustomed to regular digital communication and had the infrastructure in place to support remote working. Although face-to-face contact has been reduced, the adoption of video conferencing has made it easier and more efficient to stay in regular contact with clients.

We have also worked hard to engage with clients virtually and last year hosted over 40 webinars, covering the outlook for markets as well as reflecting on softer topics such as the purpose of wealth and sharing inspiring stories from our network of successful entrepreneurs and professionals.

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

We embrace the values that make a family harmonious and successful, acting with integrity and striving for excellence in everything we do. For an independently owned firm we have a remarkable array of in-house capabilities, but the differentiator is not our expertise but our experience we have acquired over decades working with successful families.

This has not changed - we have been privileged to support our clients, including the Fleming Family, over several decades.

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

Being recognised by the Wealthbriefing judges for the fifth year in a row highlights the quality of our service offering and the confidence and trust our clients have in us. Winning the award provides a credible third-party endorsement for the group, raises brand awareness in the region and boosts the morale of our people.

WealthBriefing Awards 2022

Stonehage Fleming
You are one Login away from making your current challenges, the strengths of tomorrow.

Without advanced and optimized risk and artificial intelligence, wealth management falls short of expectations.

ImpaQt Plus
powered by swissQuant

Username

Password

Log in

ESG solution featured at major private banks today

swissQuant
Mastering Complexity

info@swissQuant.com
What sets you apart from your peers this year and why?

Steve Jobs once stated, “Innovation distinguishes from a leader and a follower.” By anticipating market trends and listening closely to our clients and their needs, our innovation is fueled and top solutions are born – solutions which allow our clients to stand out against their peers and benefit from higher client acquisition, improved portfolio returns and reduced costs.

A case in point is our recently developed end-to-end ESG tool. During the pandemic, it became apparent that the need for high-calibre wealth advice has never been more urgent. By further evolving our risk analytics to cover ESG criteria and engineering a new solution to integrate sustainability into the portfolio process, we were one of the first to develop and integrate a tool which covers the entire client journey.

We observe that wealth and asset managers in Switzerland are striving for new innovative solutions that support their growth strategies. Our wealth management platform, driven by a best-in-class risk engine and one of the most refined portfolio construction engines available, is already used by global and local players in wealth advisory, portfolio management in the region, who want the extra edge provided by our modern technology.

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

Without people, there can be no innovation. With highly experienced engineers and outstanding expertise in wealth management, private banking, and asset management, joined by highly skilled professionals across multiple disciplines, we have an in-house power which is hard to match. As a result of our deep understanding of financial engineering and financial services backed with a best-in-class technology expertise, swissQuant has become the long-term partner of choice for organisations across the globe, including a growing number of global Fortune 500 companies as well as systemically important financial institutions.

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

In times of unprecedented change, innovation and adaptation are crucial. “Mastering Complexity” is our promise to simplify while remaining effective. When transparency in wealth management increases, decision-making becomes easier and more accurate in reaching sought-for goals.

What have been the challenges you have had to overcome?

The main challenge was to convince clients of the importance and value of quant-driven solutions in wealth management, private banking and asset management. Applying the right technology backed with a consistent quantitative approach to manage the risk of a broad range of financial instruments, including ESG Assets and crypto assets, as well as complex investment portfolios, requires the buy-in of many key stakeholders within the client’s organisation.

Whom do you look to for inspiration and ideas?

Without our clients, innovation would be less efficient and more-time consuming. They are our greatest source of inspiration allowing us to turn their challenges into added value for their business. We are also inspired and motivated by those peers, partners and competitors who excel in the WealthTech sector. In addition, we keep an eye on the newest developments coming out of science by nurturing relationships with academia and adding brain power to our advisory board. We have had the honor to engage a second Field Medalist with a distinct background in Optimization.

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

Receiving this WealthBriefing Swiss Award is a great confirmation to the outstanding quality of swissQuant’s solutions and provide a high level of credibility in the market in Switzerland as well as around the world. The awards also provide an assurance to prospective customers in the region who are trying to find the best solution in wealth management, private banking, and asset management.
WE SIMPLIFY COMPLEXITY.

Driven by independence.
Powered by tailored solutions.
Focused on performance.

We structure, protect and develop our clients' assets like our own.
That, too, is what we call performance.

TrustConsult Group
Trust in Motion

A STRONG TEAM SPIRIT AND FRIENDLY FIRM: THE TRUSTCONSULT APPROACH

WealthBriefing talked to Cécile Civiale Vuillier, Head of Private Client at TrustConsult Trustees SA. Based in Geneva, she is an experienced figure in the Alpine State’s trust and estates planning industry. She discusses the qualities that have allowed TrustConsult to excel.

I noticed around me the worry from people towards the pandemic and lots of my peers focused on themselves, forgetting about their clients’ interests while I was doing my best staying close to the families I am serving and I kept visiting them. I remained totally dedicated to them.

The biggest challenge was the difficulty to travel during the past 18 months. Our clients are very demanding and don’t fancy discussing about their private affairs over phone or zoom.

In every crisis people seek for protection and Covid was not an exception. People had time to think about their estate and succession planning and therefore proceeded with their various advisors including their trustees.

At TrustConsult, being a “Boutique” firm gave us the flexibility to continue to act as usual for our clients and prospects in their best interests by constantly adapting and meeting new requirements and using new technologies and communication instruments such as Zoom and Teams to fit the day-to-day management needs. But nothing will replace the human touch.

Trust is built in face-to-face meetings. Stay close to the clients you serve and to your team using any tools that are at your disposal, and do not stop meeting them when you can.

Being “Boutique” has never been so pertinent. It made a big difference. Flexibility is paramount in our day-to-day work. A heavy hierarchy and/or too many procedures restrict the business. When you experience a crisis the last thing you need is a restriction from your own company.

Covering about one quarter of the total global wealth and thus generating economic growth, Switzerland is one of the world’s leading locations for cross-border wealth management. There is more wealth generated every day. The industry continues to consolidate due to recent changes in the regulation in the jurisdiction and many trust companies are deciding to exit the business. The survival players are less in numbers, but well prepared and highly qualified.

Been awarded in the category ‘Best Woman in Wealth Management’ in the prestigious WealthBriefing Swiss Awards 2022, which highlights excellence among private client advisors in the international trust and financial industry is a great reward. You suddenly realise that you must do something right!

Being recognised in the industry you work for is always pleasant. I hope it will help me to develop my business further by getting me and my company known to a greater audience.

“It is IMPORTANT TO MAINTAIN CONSISTENCY IN THE QUALITY OF THE SERVICES WE DELIVER, NO MATTER WHAT. HIGH STANDARDS, INTEGRITY AND TRANSPARENCY ARE KEYS.”
The All-In-One
Wealth & Asset Management Solution

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

Geneva
Zurich
Montreal
Singapore
Luxembourg

www.wize.net
PROVIDING ALL THE SUPPORT THAT WEALTH MANAGERS NEED

Pierre Dupont, Managing Partner, WIZE by TeamWork, discusses how his firm has raised the bar in its sector.

WIZE by TeamWork, the all-in-one Wealth & Asset Management solution, is one of the fastest growing WealthTech companies in Switzerland dedicated to external asset managers, family offices, private banks, fund managers, pension funds and securities traders.

Part of the TeamWork Group, a 950+ employees Swiss company founded in 1999 and fully owned by its top management, we offer a unique 100 per cent web-integrated SaaS secured Cloud or on-premises platform including:

- Portfolio Management System with model portfolios & rebalancing/hedging capabilities; Private Equity module; risk & performance management (MWR/ TWR, contribution/attribution);
- Order Management System including FIX connectivity;
- CRM System with KYC and documents lifecycle management;
- Compliance System with AML, MiFID II and LSFin/FIDLEG/FinSA pre-trade checking; risk profiling & monitoring; full audit trail;
- Reporting System with white labelled customized multi-assets consolidated reports;
- Invoicing System including automatic fees calculation and controlling; profitability measurement;
- Multi-custodian connectivity: 180+ automatic feeds; API connectivity; and
- e-banking / Mobile App.

In Geneva, Zurich, Singapore, Luxembourg, London, Beirut and Montreal, our team of 35 professionals aims at delivering best in class support and back-office business process outsourcing (BPO) services thanks to our extensive banking operations expertise gained by most of us in different banks and/or family offices.

Trusted by over 92 clients representing 45+ billion AuM and 3,000+ 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.

Our focus: intuitive user experience, rich and performing functionalities, easy & transparent pricing.

We therefore think all these elements set us apart from our peers and make us an outstanding 11 years old FinTech.

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

WIZE by TeamWork is first of all a fantastic success story based on people.

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

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

Cedric had spotted a gap and a really growing need for EAMs and Philippe decided to invest in this team of 4 since he believed in them.

The development therefore started in 2010 from a white sheet with the latest available technologies and with absolutely no legacy. After two years and a huge investment in R&D, the first customer was signed in 2012. Since then, the WIZE by TeamWork team continuously grew to a team of 35 today and continued to be ahead of market trends, evolving constantly.

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

We hope this accolade will be perceived by our clients and team members as a strong evidence that our collaboration during the last 11 years has produced a remarkable and scalable platform.

We therefore see this accolade both as a recognition of the high quality work delivered but also as a good evidence for our prospects that they can feel in good hands with our WIZE by TeamWork platform and team.

Pierre Dupont, Managing Partner, WIZE by TeamWork,

PROVIDING ALL THE SUPPORT THAT WEALTH MANAGERS NEED

Pierre Dupont, Managing Partner, WIZE by TeamWork, discusses how his firm has raised the bar in its sector.
We want to extend our warmest thanks to all our clients for their trust and support, which has enabled us to develop the high-quality services that have earned us recognition as “Best Alternative Fund Manager” at the WealthBriefing Swiss Awards 2022.
THE WEALTHBRIEFING SWISS AWARDS WINNERS 2022

WINNERS: INVESTMENT MANAGEMENT CATEGORIES

ETF PROVIDER
LYXOR etf

FIXED-INCOME INVESTMENT STRATEGY
AXIOMA

FUND MANAGER
DECLALIA

FX SOLUTION PROVIDER
INDOSUEZ WEALTH MANAGEMENT

ALTERNATIVE FUND MANAGER
UBP UNION BANCAIRE PRIVÉE

STRUCTURED PRODUCT PROVIDER
BNP PARIBAS WEALTH MANAGEMENT

PRIVATE INVESTMENT OFFICE/ MULTI-FAMILY OFFICE
STONEHAGE FLEMING

EQUITY-BASED INVESTMENT STRATEGY
Private Bank Citi

WINNERS: MARKETING/PR CATEGORY

USE OF SOCIAL MEDIA
FINANZLAB

MARKETING CAMPAIGN OR TEAM
LOMBARD ODIER
WINNER: Indosuez Wealth Management

WINNER: Indosuez Wealth Management

WINNER: Indosuez Wealth Management

WINNER: Indosuez Wealth Management

WINNER: IQ-EQ

WINNER: New Access SA

WINNER: LGT

WINNER: LGT
WINNERS: WEALTH MANAGEMENT TECHNOLOGY CATEGORIES (VENDORS & IN-HOUSE)

FRONT OFFICE SOLUTION

**avaloq**
An NEC Company

IMPLEMENTATION OF A TECHNOLOGY SOLUTION

**aixigo**
Driving the New Wealth Experience.

ON-BOARDING SOLUTION

**Appway**

PORTFOLIO MANAGEMENT SOLUTION

**SS&C ADVENT**

TRANSACTION PROCESSING SOLUTION

**eRTI**

BEST CRM SYSTEM

**investcloud**

COMPLIANCE SOLUTION

**APIAX**

INNOVATIVE FINTECH SOLUTION

**WZE**

RISK PROFILING SOLUTION

**prometeia**

CLIENT REPORTING SOLUTION

**WZE**

RISK MANAGEMENT SOLUTION

**swissQuant**
Mastering Complexity

IMPLEMENTATION OF A TECHNOLOGY SOLUTION (IN-HOUSE)

**Geneva Management Group**
Swiss Precision. Global Solutions.

INNOVATIVE CLIENT SOLUTION

**new access**

INNOVATIVE CLIENT SOLUTION (IN-HOUSE)

**GAC INDOSUEZ WEALTH MANAGEMENT**
## WINNERS: WEALTH MANAGEMENT TECHNOLOGY CATEGORIES (VENDORS & IN-HOUSE)

<table>
<thead>
<tr>
<th>Category</th>
<th>Winner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology Outsourcing Solution</td>
<td>Lombard Odier</td>
</tr>
<tr>
<td>Data Provider</td>
<td>WeCan</td>
</tr>
</tbody>
</table>

## WINNERS: PRIVATE CLIENT CATEGORIES

<table>
<thead>
<tr>
<th>Category</th>
<th>Winner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Best Lifestyle Consultancy</td>
<td>BearingPoint</td>
</tr>
<tr>
<td>Institutional Trust or Fiduciary Company</td>
<td>Leo Trust</td>
</tr>
<tr>
<td>Management Consultancy</td>
<td>Schellenberg Wittmer</td>
</tr>
<tr>
<td>Legal Team</td>
<td>Geneve Management Group</td>
</tr>
<tr>
<td>Tax/Accountancy Team</td>
<td>Rawlinson &amp; Hunter</td>
</tr>
<tr>
<td>Boutique Firm</td>
<td>Geneve Management Group</td>
</tr>
<tr>
<td>Independent Trust or Fiduciary Company</td>
<td>Accuro Trust and Private Office</td>
</tr>
<tr>
<td>Estate Planning Advice</td>
<td>Geneve Management Group</td>
</tr>
</tbody>
</table>

## WINNERS: EAM CUSTODIAN CATEGORIES

<table>
<thead>
<tr>
<th>Category</th>
<th>Winner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Platform for External Asset Managers</td>
<td>Sy Private Banking</td>
</tr>
<tr>
<td>Compliance Solution for External Asset Managers</td>
<td>WeCan</td>
</tr>
</tbody>
</table>
WINNER: Franck Bonin, Societe Generale

WINNER: SS&C Advent

WINNER: Stonehage Fleming

WINNER: SwissQuant AG

WINNER: Cécile Civiale Vuillier, TrustConsult Suisse

WINNER: WIZE by TeamWork

WINNER: DECALIA

WINNER: Union Bancaire Privée
## WINNERS: PRIVATE BANKING CATEGORIES

**HNW TEAM (SWISS DOMESTIC CLIENTS)**
- [Reyl Intesa Sanpaolo](#)

**HNW TEAM (INTERNATIONAL CLIENTS)**
- [Rothschild & Co](#)

**CLIENT INITIATIVE**
- [Capitalium Wealth Management](#)

**INTERNAL COMMUNICATIONS INITIATIVE OR TEAM**
- [Indosuez Wealth Management](#)

**CUSTOMER FACING DIGITAL CAPABILITIES**
- Private Bank
- [Citi](#)

**FAMILY OFFICE OFFERING**
- [Edmond de Rothschild](#)

**UHNW TEAM (INTERNATIONAL CLIENTS)**
- [Private Bank](#)
- [Citi](#)

**SPECIALIST INTERNATIONAL TEAM**
- [Barclays](#)

**UHNW TEAM (SWISS DOMESTIC CLIENTS)**
- [17 96 Lombard Odier](#)

**INVESTMENT MANAGEMENT PLATFORM**
- [Gonet Banquiers 1845](#)

**DOMESTIC PRIVATE BANK**
- [17 96 Lombard Odier](#)

**CREDIT PROVIDER**
- [BNP Paribas Wealth Management](#)

**FOREIGN PRIVATE BANK**
- [LGT Private Banking](#)
WINNERS: SPECIALIST WEALTH MANAGEMENT CATEGORIES

WEALTH MANAGEMENT EXECUTIVE SEARCH FIRM
LEXTON STANLEY

WEALTH PLANNING TEAM
IQ EQ

HIGHLY COMMENDED - WEALTH PLANNING TEAM
BNP PARIBAS WEALTH MANAGEMENT

IMPACT INVESTING
REYL INTESA SANPAOLO

ESG
LGT Private Banking

HIGHLY COMMENDED - ESG
BNP PARIBAS WEALTH MANAGEMENT

CORPORATE SOCIAL RESPONSIBILITY/ DIVERSITY PROGRAMME
LOMBARD ODIER

WINNERS: LEADERSHIP CATEGORIES

RISING STAR UNDER 40
Nicolas Syz

CEO
Franck Bonin

WOMAN IN WEALTH MANAGEMENT (COMPANY CONTRIBUTION)
INDOSUEZ WEALTH MANAGEMENT

WOMEN IN WEALTH MANAGEMENT (INDIVIDUAL CONTRIBUTION)
Cécile Civiale Vuillier

LEADING INDIVIDUAL
Andrew McCallum

RAWLINSON & HUNTER
GLOBAL AWARDS
Showcasing The Best in the Industry

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

2022/2023 Announcements Schedule

FEBRUARY 2022
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
WealthForGood Awards

JUNE 2022
WealthBriefingAsia Awards
WealthBriefingAsia WealthTech Asia Awards

OCTOBER 2022
WealthBriefingAsia EAM Awards

NOVEMBER 2022
WealthBriefing MENA Awards

DECEMBER 2022
WealthBriefing Channel Islands Awards

FEBRUARY 2023
WealthBriefing Swiss Awards

For more information: + 44 (0) 20 7148 0188 (UK office)
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