



DECEMBER 2022

The Inaugural *WealthBriefing*
Channel Islands Awards

INFORMATION PACK

Overview

Introduction

A warm welcome to the **Inaugural WealthBriefing Channel Islands Awards 2022**, the latest addition to the *WealthBriefing* global awards programme.

Independently judged by teams of experts, these new awards will be bestowed on the brightest and best amongst the Channel Islands’ world-renowned wealth management professionals - both teams and individuals.

With the backing of the *WealthBriefing* pedigree for independence and genuine insight, winning a *WealthBriefing* Channel Islands award gives exposure not only locally but in all the major wealth management jurisdictions in which *WealthBriefing* operates.

Categories

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

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

Judging

There are two judging panels for the awards:

A panel of trusted advisors who will be responsible for judging the family office, private banking and investment categories.

A second panel of family office and banking professionals judge the trusted advisor categories.

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

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



Key dates for the diary:

Nominations open	25 April 2022
Submission deadline	9 September 2022 (Midnight)
Winners Notified of Their Success	October 2022 (tbc)
PUBLIC ANNOUNCEMENT & GALA CEREMONY	December 2022 (tbc)

Categories & Criteria

PRIVATE BANKING CATEGORIES (OVERALL)

Open to all private banks that have an operation in Jersey or Guernsey, and have a demonstrable track record of an exceptional service provision:

- OVERALL PRIVATE BANK
- BOUTIQUE PRIVATE BANK
- PURE PLAY PRIVATE BANK
- EMPLOYER OF THE YEAR
- TALENT MANAGEMENT INITIATIVE (RECRUITMENT OR RETENTION)
- INNOVATIVE USE OF TECHNOLOGY OR CUSTOMER FACING PLATFORM

PRIVATE BANKING CATEGORIES (TEAM BASED)

Open to private banks or individual teams within banks that have an operation in Jersey or Guernsey, and have a demonstrable track record in servicing U/HNW clients and families in the following categories:

- WEALTH PLANNING
- CREDIT PROVIDER
- FX SOLUTION
- REAL ESTATE ADVISORY
- INVESTMENT PLATFORM OR SOLUTION
- PHILANTHROPY
- CHARITY
- ESTATE PLANNING
- ESG/IMPACT INVESTING
- FAMILY OFFICE SERVICES

TRUST CATEGORIES

Open to all companies which are operational in the Channel Islands and offer Trust Services:

- OVERALL TRUST COMPANY
- TRUST COMPANY WITH AN INTERNATIONAL HQ (OUTSIDE CI)
- INDEPENDENT
- INSTITUTIONAL
- BOUTIQUE OR SPECIALIST SERVICE
- TECHNOLOGY PLATFORM
- FUND ADMINISTRATION SERVICE
- INVESTMENT ADVICE AND STRUCTURING
- ESG PROGRAMME
- DIVERSITY INITIATIVE
- EMPLOYER OF THE YEAR
- FAMILY OFFICE SERVICES

PRIVATE CLIENT AND FIDUCIARY SERVICE CATEGORIES

Open to all trust and advisory businesses with an operation in the Channel Islands that can demonstrate a strong record of servicing UHNW clients or families:

- COMPANY FORMATION SPECIALIST
- GLOBAL CITIZENSHIP PROGRAMME
- INVESTOR SERVICES
- LEGAL TEAM
- ACCOUNTANCY/ACCOUNTING SERVICES
- TAX TEAM
- FAMILY OFFICE GOVERNANCE
- SUCCESSION PLANNING ADVISORY SERVICE
- NEXT GEN INITIATIVE
- INTELLECTUAL PROPERTY SERVICES

INVESTMENT MANAGEMENT CATEGORIES

Open to all firm offering investment management services which, operational in the Channel Islands, offer specialist advice or services:

- OVERALL INVESTMENT MANAGER
- FUND MANAGER
- MULTI FAMILY OFFICE
- ALTERNATIVE ASSET MANAGER
- PENSION SERVICES
- WEALTH PLANNING
- INNOVATIVE DIGITAL ASSET INVESTMENT PLATFORM

INSURANCE CATEGORIES

Open to firms operational in the Channel Islands that offer specialist insurance advice or services:

- OVERALL INSURANCE PRODUCT OR SERVICE/PLATFORM
- PRIVATE PLACEMENT LIFE INSURANCE (PPLI)
- CAPTIVE INSURANCE

Categories & Criteria

SPECIALIST CATEGORIES

Open to firms operational in the Channel Islands that offer specialist advice or services to private banks, family offices or U/HNW family members in the following areas:

- RECRUITMENT/HEADHUNTING
- CONCIERGE/LIFESTYLE (INCLUDING SPECIALIST TRAVEL/AVIATION/MARINE)
- MANAGEMENT/REGULATORY CONSULTANCY (NON-TECH)

MARKETING AND PR CATEGORIES

Open to firms based in the Channel Islands that have either been involved in a specific marketing campaign or on-going communication strategy to family offices or U/HNW family members/clients. This can be a financial institution or a marketing/PR agency and can include international activity:

- MARKETING AND PR CAMPAIGN (AGENCY)
- INTERNAL COMMUNICATIONS (WITHIN A PRIVATE BANK OR WEALTH MANAGER)

WEALTHTECH CATEGORIES (TECHNOLOGY SOLUTION PROVIDERS)

Open to all technology companies or solution providers wherever they are based, which are operating in the Wealthtech/Fintech sector in the Channel Islands:

- OVERALL WEALTHTECH PROVIDER
- FRONT OFFICE
- TRANSACTION PROCESSING
- COMPLIANCE
- ONBOARDING
- KYC
- CRM
- CLIENT LIFECYCLE MANAGEMENT
- PORTFOLIO MANAGEMENT
- RISK MANAGEMENT
- DATA PROVIDER
- CLIENT REPORTING
- CLIENT ACCOUNTING
- CLIENT COMMUNICATIONS
- AI SOLUTION
- MANAGEMENT CONSULTANCY (TECHNOLOGY)
- INNOVATIVE CLIENT SOLUTION

LEADERSHIP AND INDIVIDUAL CATEGORIES

Open to individuals active in the Channel Islands who are involved in wealth management and have shown exceptional leadership. (*The Rising Star category should be backed by their employer*):

- CHIEF EXECUTIVE OFFICER (CEO)
- FEMALE LEADERSHIP
- CHIEF INVESTMENT OFFICER
- LEADING WEALTH MANAGER/INVESTMENT PROFESSIONAL
- LEADING LAWYER
- LEADING TRUST PROFESSIONAL
- THOUGHT LEADERSHIP
- RISING STAR
- LIFETIME ACHIEVEMENT

Sponsorship Opportunities

These prestigious awards recognise excellence within the wealth management, family office, and private client industries. As a sponsor they provide your business with a highly affluent, captive audience of private bankers, lawyers, accountants, financial advisors and technology providers across the wealth management sector, presenting a unique opportunity to raise or enhance your profile and to network in a dedicated business environment.

Specifically, sponsorship provides the following:

- Enhanced editorial coverage across our associated international news wires (over 60,000 subscribers worldwide) in articles and announcements about the Awards programme.

- Extensive brand exposure at the gala presentation event.
- The opportunity to target an affluent market with high disposable income amongst the Event's guests.
- Excellent networking opportunities with senior decision-makers who are in attendance.
- Association with the leading international wealth management awards programme.
- The chance to develop new contacts and expand your sales network.
- Increased brand exposure within the wealth management sector generally and specifically access to a unique social media community.

FOR SPONSORSHIP OPPORTUNITIES CONTACT:

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Partners who support our global awards



Sponsorship Opportunities

SPONSORSHIP BENEFITS	HEADLINE	SPONSORING PARTNER
Verbal acknowledgement from awards host	✓	✓
Guest invite for gala celebration	10	5
Branding on awards presentation event backdrop	✓	✓
Logo in awards programme	✓	✓
Full-page colour advertisement in awards programme	✓	✓
300-word profile in awards programme	✓	✓
Web banner on main awards event website with link	✓	✓
Opportunity to make welcome speech from main awards podium	✓	
Name associated with 3 awards categories subject to availability	✓	✓
Interview with the Editor of <i>WealthBriefing</i> for a feature on your firm's activities	✓	
Professionally produced video	✓	✓
	£12,500	£8,000

Awards Publication

Acclaim: WealthBriefing's Exclusive Awards Record of Achievement

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

The collage displays eight award publications from the Acclaim Awards 2022. The publications include: 1. 'The WealthBriefing Swiss EAM Awards Winners 2022' with a list of winners in various categories. 2. 'The WealthBriefing European Awards Winners 2021' with a list of winners. 3. 'Team Spirit Makes Decisive Difference For Telomere Capital' featuring a photo of a sports team. 4. 'Stronger Diversity and Flexibility - The Indosuez Wealth Management Way' featuring a photo of a man in a suit. 5. 'A generation of work. Working for generations.' featuring a photo of a group of people. 6. 'Serving Clients at Every Stage Across Professional and Personal Life' featuring a photo of a man in a suit. 7. 'What you focus on responsible finance so you can focus on sustainable wealth.' featuring a photo of a modern building. 8. 'What do you hope will be the result of winning this award?' featuring a photo of a group of people.

Global Awards



2022/2023 Announcements Schedule

MAY 2022
Family Wealth Report Awards
WealthBriefing Wealth For Good 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

FEBRUARY 2022
WealthBriefing WealthTech Americas Awards

MARCH 2022
WealthBriefing Swiss EAM Awards
WealthBriefing European Awards

APRIL 2022
WealthBriefingAsia Greater China Awards



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

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

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

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

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

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