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



EXCLUSIVE
WINNERS OF THE 2022
WEALTHBRIEFING
SWISS EAM AWARDS
FOR EXCELLENCE

MARCH 2022

EXPLORING NEW TRENDS



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FOREWORD

Tom Burroughes, Group Editor, *WealthBriefing*

It is my pleasure to introduce you to this *WealthBriefing* publication. It is a chance for winners in these awards 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. We are particularly keen to flag the work done in the EAM industry, one that perhaps gets overshadowed by the banking industry that the broader public is much more familiar with.

In a world when demands for smart capital investment is more urgent than ever, 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. 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.

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WEALTHBRIEFING SWISS EAM AWARDS
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OVERVIEW OF THE SWISS EAM MARKET

Switzerland is readying itself for new regulations covering EAMS at the end of 2022. Based on end-June registrations with FINMA, there are about 2,000 EAMs. Some business owners who founded firms in the 1980s and 90s will want to retire; rising costs will also engender partnerships, merger deals and more outsourcing of non-core functions.

EAMs need to invest in technology to meet the heightened reporting requirements the legislation brings; that's generating a lot of business for tech firms and banks. Service providers to EAMs know that sectors going through transformation make good clients – a fact not lost on banks such as Lombard Odier and LGT, to give just two cases.

One driver of the sector's health has been a number of niche business areas, such as those EAMs having their business licensed with the SEC and focusing on serving expat US citizens living in Switzerland, and those concentrating on sustainable/ESG areas of investing. Others specialise in technology, biotech and life sciences, and cryptocurrencies/digital assets.

Swiss EAMs have often been built by breakaway teams of bankers seeking independence, closeness to clients and freedom from bureaucracy. Even so, with pressures across the world to regulate financial services more closely after the turmoil of 2008-09, Switzerland-based EAMs have come under the spotlight.

A new regime to license these institutions, and to require standards of reporting and disclosure, has been introduced by a number of Swiss federal acts – Financial Services Act (FinSA) and the Financial Institutions Act (FinIA). The acts came into force at the start of 2020. FinSA took full effect at the start of 2022. FinSA contains the code of conduct setting out how financial service providers must comply *vis-à-vis* their clients, in some ways mirroring the European Union's MiFID II regime. FinIA standardises the authorisation rules for certain financial institutions. EAMs and trustees must apply for a licence from FINMA by the end of 2022.

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

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

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

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

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

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

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

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

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

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

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

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

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

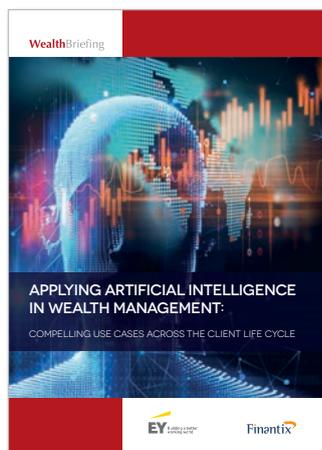
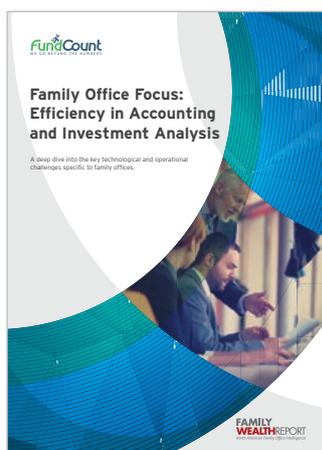
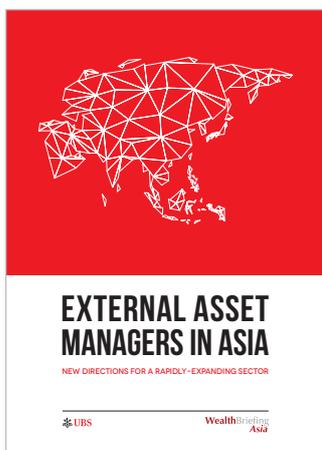
underserved one in many senses in spite of their growing financial power and pronounced need for professional advice. Our second report examining women's specific needs presents truly actionable insights drawn from interviews with H/UHNWIs and their advisors right across the region.

Technology & Operations Trends in Wealth Management 2021
(in partnership with SS&C Advent)

This succinct yet wide-ranging report shines a light on both macro and micro trends, beginning with industry growth sentiment and ending on operating model evolution, taking in every key area of development in between. It brings together datapoints and candid comments senior executives at leading consultancies across the world's major wealth markets to create an invaluable peer benchmarking tool.

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

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



JUDGING PANEL

Our global awards program is built on the independence of our judges. For the *WealthBriefing* External Asset Management (EAM) Awards, the judges were invited from partners in the custodian banks, technology companies and other service providers.

Each judge signed an NDA to ensure that all the information they received in the submissions is kept in the strictest of confidence.



DR. MARIO A. BASSI
Senior Advisor
Private Wealth
Management



IAN EWART
Chairman
Acin Ltd



VÉRONIQUE RIONDEL ANGEBAULT
Head of Syz Independent
Managers
Banque SYZ



CÉCILE CIVIALE VUILLIER
CEO, Group Head of
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Trustconsult Group SA



JOHN HANAFIN
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Chairman and Founding
Partner
MilleniumAssociates



GILLES CORBEL
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ANNE LIEBGOTT
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PIERRE DUPONT
Managing Partner
WIZE by TeamWork



LAURENT PELLET
Executive Vice President,
Global Head of EAM,
Lombard Odier



PETER VANGHER
Head of the
Intermediaries Business
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ALAIN ESSEIVA
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RYAN PYLE
Founding Partner
Maine Investment



MARKUS WERNER
Head of Intermediaries
Business
LGT Gruppe Holding AG



WealthBriefing AWARDS 2022 SWISS EAM
WEALTH PLANNING TEAM — WINNER —
Alpen Partners

WealthBriefing AWARDS 2022 SWISS EAM
BASED IN ZURICH — WINNER —
Alpen Partners

WealthBriefing AWARDS 2022 SWISS EAM
SERVICING NORTH AMERICAN CLIENTS — WINNER —
Alpen Partners

Swiss-based global wealth management
for an international clientele
from over 30 countries around the world
including the United States and Canada

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BUILDING BEST SOLUTIONS FOR MULTI-NATIONAL, MULTI-JURISDICTIONAL CLIENTS

Tom Burroughes, Group Editor at *WealthBriefing*, talks to Pierre Gabris, Founder & Managing Partner, **Alpen Partners**.

Alpen Partners is an independent wealth management company founded by Pierre Gabris, with 17 partners and a growing, supporting staff of 16. We provide Swiss-based, wealth and asset management services to HNW individuals and ultra-HNW individuals from around the world.

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

We have grown significantly, welcoming five new partners mostly covering the LATAM and American markets where we see a strong potential. Alpen Partners International is registered with the Securities and Exchange Commission as an investment advisor and welcomes American clients domiciled in the US and abroad. We have a desk for successful entertainers and professional athletes, which have special needs regarding their present and future financial well-being. We have offices in Bäch/Wollerau (headquarters), Geneva, Locarno, and Zurich.

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

Our partners are entrepreneurs and their entrepreneurial spirit is catching! Each has specific areas of competence and we can count on each other to collaborate to develop the best solutions for our multi-national, multi-jurisdictional clients.

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

Our clients have high expectations and we aim to deliver more than we promise. As an independent wealth and asset manager we have a fiduciary obligation to put our clients' interests before our own and our disciplined and streamlined, yet individualised, approach keeps our clients satisfied.

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

Onboarding new partners and employees always requires a high level of acceptance and flexibility and a commitment to upscale at every level.

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

Reacting to the pandemic proved that we have all the moving pieces in place to assure an uninterrupted service for our clients, many of which are abroad and experienced worse conditions than we did in Switzerland.

What lessons have been learnt that can be carried forward?

Listening to our clients' additional concerns during the pandemic became very important, as wealth structuring for the next generation, citizenship and residence planning, and holding assets in the resilient environment of Switzerland became more sought after.

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

In light of increased AI and roboadvisors, we prefer the personal, individualized approach to creating solutions for our clients' often complex international investment needs...we do not have an off-the-shelf mentality.

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

As we were less affected by shut-downs, had no curfews and no stay-at-home orders our flexible and optimistic colleagues handled the crisis well.

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

Wealth structuring is as important as wealth and asset management. In many cases, wealth preservation takes the front seat. Involving the next generation has also gained in importance. Overall the



Pierre Gabris
Founder & Managing Partner,
Alpen Partners

motto is, "Be prepared" for unexpected and changing circumstances.

Whom do you look to for inspiration and ideas?

We look to our multi-cultural colleagues of all genders and ages. Anyone can bring forth ideas, which we discuss. Inputs from our clients inspires us to develop our offering even further to accommodate their growing needs.

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

We are proud and honoured to receive not just one but three accolades, as a recognition of our concentrated efforts to provide services of excellent quality to increasingly sophisticated clients in an ever-changing environment. ■





WINNER: AlphaSwiss Partners



WINNER: Alpen Partners



WINNER: Apricus Finance

INVESTING DIRECTLY IN PRIVATE EQUITY HELPS ALPHASWISS SHINE

Yann Labry, CEO, **AlphaSwiss Partners**, talks to Tom Burroughes, Group Editor of *WealthBriefing*, about what makes his firm stand apart.

AlphaSwiss is an independent wealth management firm based in Geneva providing tailor-made asset management and independent advisory services to high-net-worth individuals and corporations around the world, always in line with the given regulatory requirements.

Since founding AlphaSwiss in 2014, our core values have always been to deliver personalized service, unbiased advice, exclusive opportunities and a truly bespoke approach to our clients. At AlphaSwiss, we don't believe in one-size-fits-all strategies. Rather, we work to build portfolios that are fully bespoke, built and managed around our clients' needs, designed to focus on their objectives.

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

Our team comprises senior private bankers and investment specialists offering complementary expertise, all of whom work seamlessly to ensure our client's goals and wishes always come first.

Together with our clients, we built a tailor-made solution that fulfils objectives and the needs of the next generation.

In order to embrace the changing world we're living in, the team and people are key elements to our company. Strong team spirit, sharing the same vision and setting mutual goals remain a key element to our success.

Our key differentiator is our ability to invest directly in the private equity of companies raising capital.

These exclusive opportunities, with an investment horizon of three to five years, are sourced through our venture capital network. We focus on growth stage deals in which AlphaSwiss has determined a large risk-adjusted return potential and enable our clients to build a diversified portfolio of venture capital investments over time, besides their core allocation.

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

With our open architecture, everyone has its own added value while sharing the company's DNA.

They add their "*pierre à l'édifice*" on the various functions: from the investment team (to each asset classes), to the relationship managers, the support, the compliance, the management or the administration. We always focus on getting the best of each other's strength and work as a team. Each of us takes part of conveying the know-how, vision and identity of the company whether it's to our clients or any third party.

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

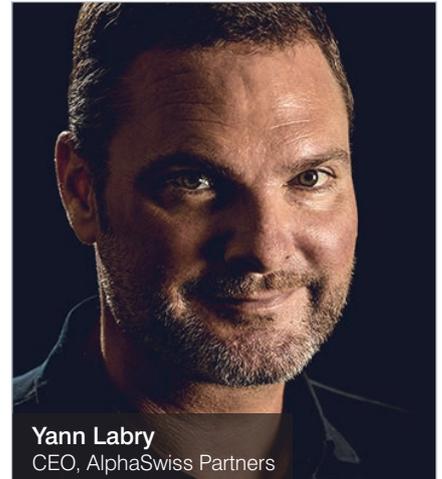
Besides servicing our clients, one of our core principles has been to set-up a structure that enables us to have "in-house" expertise to be on top of all regulatory, control, risk and compliance aspects. FinIA and FinSA have been an opportunity to further strengthen our organisation and submitted our request for authorisation with FINMA. To lead the implementation of these new laws, the key change for our company was the hiring of our new general manager and an experienced chief investment officer to reinforce our management team. Additionally, we hired an experienced compliance officer. This has helped us to foster our proactivity and dynamic approach to the ongoing challenging legal and regulatory environment.

We always try to maintain a high level "alpha" generation and focus on the added value to our clients. Over the last few years, our focus has been mainly on tech and innovation which led to set up direct access to private placements for our clients.

Furthermore, we setup a joint venture with a Swiss based high-end consultant company, in order to enhance the services to our clients. We also carry on our development of Real Estate footprint in Germany, the UK and Spain through our partners, adding some more diversification to our asset allocation.

What lessons have been learnt that can be carried forward?

Team spirit and sharing a common vision is a key element to a prosperous



Yann Labry
CEO, AlphaSwiss Partners

business! Despite our business model focusing on our client service excellence covering most of their needs, our company does never stop the "Change Management Process". Starting with the organisation being structured to meet all regulatory requirements, we continue to work with the best professionals within the industry to constantly meet the needs of our clients. When setting-up access to Private Market, Real Estate and our top custodian banks, or when providing Team-Building Events or upgrading with innovation our working environment, every step we make is to get better as a company and as individuals. We always seek the best to meet the demanding and complex needs of our high-end clientele.

AlphaSwiss never leaves one stone unturned to find more innovative and appropriate solutions to remain ahead of the curve.

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

It allows a greater visibility for our company and also to share thoughts and visions with a wide range of local players. ■



Families, with families, for families



APRICUS FINANCE

WEALTH MANAGEMENT

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PARTNERSHIPS AND PERSONALISATION: THE APRICUS FORMULA

François Struye, CEO, **Apricus Finance**, discusses with Tom Burroughes of *WealthBriefing* his firm's accomplishments.

Founded in 1995, Apricus Finance is a family owned EAM delivering first class, discreet Asset Management & Family Office services to U/HNW individuals and families. The independence of our family group ensures the alignment of our interests with those of our clients. We consider proximity and reliability the cornerstones of our client relationships.

Each client is unique, with a personalised wealth management solution that evolves over time, mirroring the client's own personal journey. For family office clients, this extends to a personalised investment team, supporting clients with a wide range of services: from help setting up legal structures, to undertaking due diligence on external providers, from helping determine key wealth touch points and objectives, to corporate governance advice and next generation structuring.

Apricus Finance partners with 15 banks across four jurisdictions: Switzerland, Singapore, Lichtenstein and Luxembourg. Supported by our advanced IT platform, TeamWork, we provide robust performance, risk & cost analysis, effective cash-flow management and professional audit reporting.

Our investment professionals are known for their vast experience, flexibility and agility, combining long-term wealth protection with innovative and creative solutions. The keys to our success are a combination of our **market-conscious** approach, strategic and thematic convictions, coupled with a flexible and opportunistic investment DNA.

This is what sets us apart, because we are leading the way in External Asset Management by evolving the historical mould. How? Asset managers, be they banks or independents, are highly aware of, and thus closely aligned to, market recognised benchmarks – be they the MSCI World Equity Index or the Bloomberg Global Aggregate Bond Index, to name those most commonly

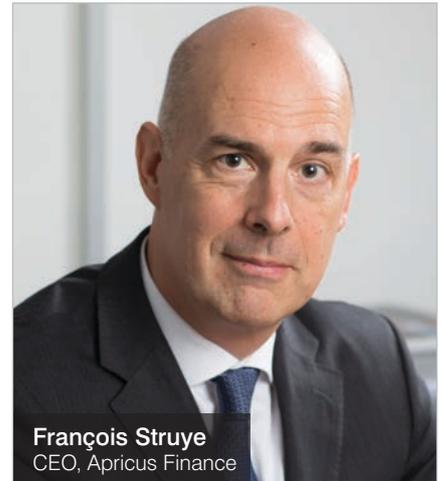
used. Matching the indices performance and ideally out-performing, with a little alpha, is considered a success. What happens, though, if we believe that a constituent of an index is likely to dramatically underperform?

Do we slavishly follow it? Well, no, this is where the first pillar of our investment process comes in – our **market-conscious** approach. For example, throughout 2021, we were “conscious” of the index weighting to US treasuries. Seeing no value in this segment, Apricus Finance was heavily underweight US treasuries (and remains so), preferring a markedly over-weight position in investment grade bonds, more than doubling the index allocation. More broadly, we underweight our **market conscious** exposure by roughly 20%. Why? Because we believe that there are two elements that can help drive out-performance for our clients.

Firstly, targeting key “**thematics**”, that we believe will be the focus of future market growth and secondly, having a flexible, nimble and tactical approach to market changes. For example, in March 2020, in response to the on-set of Covid, and the effect that this was having on dividends, we closed our European dividend strategy and transformed it quickly into a European Recovery Strategy. This proactive, opportunistic change resulted in a performance of + 75% in the 12 months that followed. This ability to adapt quickly and decisively sets us apart from our competitors.

Actively evolving the market, is not done to be different though, it is a by-product of our instinctive style. Apricus Finance seeks excellence in everything it does. If this results in us forging our own distinctive and unique path, then so be it, as long as it is always to the benefit of our clients and free of any conflict of interests.

Being family owned, we our families, working with and for families, ensuring that each client receives the attention



François Struye
CEO, Apricus Finance

and service they deserve, as a member of the Apricus “Club”. This is why we are unique, with everything dedicated to ensuring that the best interests of our clients are met, time and again. ■

“WE CONSIDER **PROXIMITY AND RELIABILITY** THE CORNERSTONES OF OUR CLIENT RELATIONSHIPS. EACH CLIENT IS **UNIQUE**, WITH A PERSONALISED WEALTH MANAGEMENT **SOLUTION** THAT **EVOLVES** OVER TIME, MIRRORING THE CLIENT'S OWN **PERSONAL JOURNEY.**”

The next generation is coming.
Here and now.

Driven by excellence.
Powered by innovation.
Focused on performance.



We are entering a whole new era. Complex, interconnected, fast-paced - the world we live in is changing. The successes of the past no longer define the ways of the future. Knowledge, intuition and prediction become the key. Own your future today, with Capitalium. Leading the next chapter in Wealth Management.

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.



Clément Schoeb, Alain Zell and Sébastien Leutwyler
Capitalium Advisors SA

Capitalium won the category of 'Next-Gen Programme' in the *WealthBriefing* Swiss EAM Awards 2022. The firm develops solutions that are tailored for clients whether they are families, entrepreneurs or Millennials. The firm tries to simplify the financial lives of clients as far as possible. The organisation is based in Geneva with a branch in Neuchâtel. The company advises Swiss and international clients on financial and non-financial aspects of asset management.

What sets you apart from your peers this year?

Company wise, we stick to our objective to offer a value-adding platform for wealthy families looking to set-up a robust financial strategy. As an independent structure, we benefit from an absolute freedom to shape tailor-made solutions. On the investment side, the differentiation states in our ability to develop solutions outside the crowded listed markets. Again, the decision we made to exclude "retrocessions" from our business model creates a pipeline of unique opportunities.

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

We maintain a start-up-like environment through a culture of innovation. We work on connecting each member of the team with our mission to transform the wealth management industry and to offer to our clients a unique financial experience. In

order to achieve our goals, complementarity of skills and characters has proven crucial to develop the company. Diversity is a key factor.

In recent years, Capitalium has taken minority stakes in Schoeb Frote, a wealth management company and more recently in Finanzlab, a firm focusing on advice and brokerage of structured products and Fusion Partners, a start-up incubator. Synergies between companies in our filed are common, this combination allows us to offer our clients a more competitive proposition with the most integrated value chain possible.

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

To become an award-winner is not an objective, but rather the consequence of business practices that have been turned into a successful business model. Or, at least, the testimony that you are doing something that is creating some value for your clients. Our vision remains intact and we intend to continue to invest every penny we earn to support our development and attract talented people who share our values and vision.

What have the challenges been in obtaining excellence?

The pursuit of excellence has somehow to connect with a high degree of enthusiasm. It requires a lot of efforts that must be balanced with positive energy in order

to be sustainable in time. Besides, we are working every day to secure that our clients support the development strategy. Ultimately, excellence is a relative concept versus your peers, as well as an absolute criteria driving each decision we make.

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

Without any doubts, benchmarks and inspiration come from outside our industry. It is unlikely changes will emerge from within our sector. The vast majority of participants are facing profitability issues and fight for a status quo. As a consequence there is no chance to find any inspiration under these conditions. The wealth management sector has suffered from a lack of governance and entrepreneurship that created inertia. The divergence between outputs that would become commoditized and the one that will protect a high value proposition is getting bigger. We are in the game for the second option !

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

The more people can get to know about our business model and the new standards Capitalium and its partners Schoeb Frote, Finanzlab and Fusion Partners are raising, the better.

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

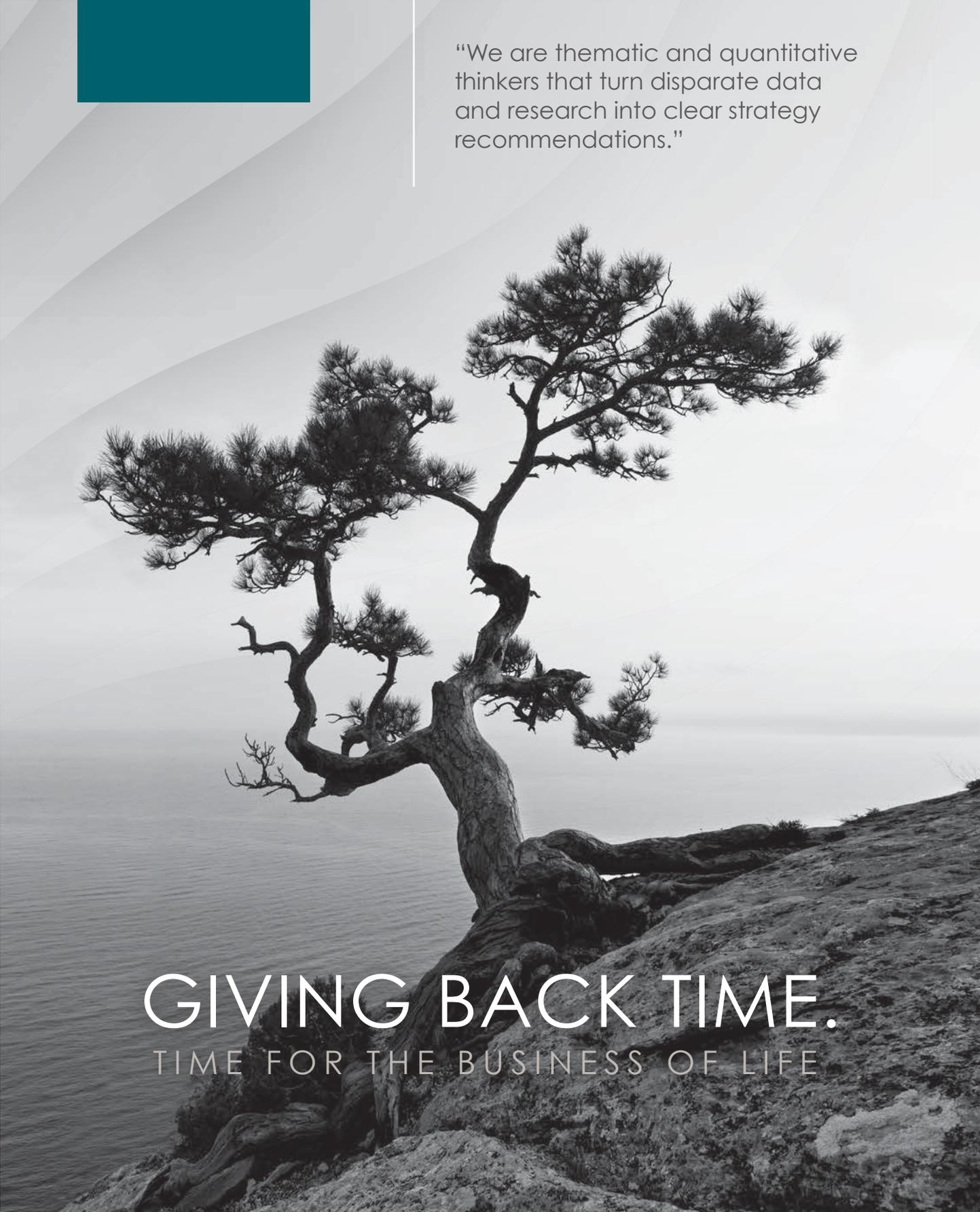
The perception of the industry about what we do is something we do not pay a lot of attention. Only the clients decide whether your value proposition make any sense. In that respect, the award can act as a testimony that we do deserve to have a close look at.



CdR
CAPITAL

 WealthBriefing **SWISS EAM**
AWARDS 2022
BEST EAM IN GENEVA — WINNER —
CdR Capital SA

“We are thematic and quantitative thinkers that turn disparate data and research into clear strategy recommendations.”



GIVING BACK TIME.
TIME FOR THE BUSINESS OF LIFE

BLENDING QUALITY AND QUANTITATIVE APPROACHES PROVES WORTH FOR CDR CAPITAL

Jenny Hennessy, Chief Operating Officer, **CdR Capital SA**, discusses the qualities of her business and reasons for success.



Jenny Hennessy
Chief Operating Officer, CdR Capital SA

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

We have used the COVID era as a period of reflection to look inwardly at how we might continue our growth strategy and achieve our business objectives, and as a result, have upgraded substantially our investment processes and our investment team. We believe that our mix of quantitative and qualitative investment techniques are cutting edge, and this is starting to show in our investment performance.

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

We have always hoped that CdR would be greater than the sum of its parts. We are just as proud of our office managers, head of trading, investment team, operational professionals as we are of our senior bankers.

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

The impact of regulatory change and consolidation in the Swiss financial services industry is now upon us. This is an exciting time to be in business and we believe that the key to success will be continuing to attract senior bankers, our

investment performance and aggressive use of new technologies to better serve our clients, without deviating from a business model which works.

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

Identifying appropriate technology, continuously working on internal communication and team work and keeping up to date with the rapidly changing regulatory environment.

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

COVID has taught us that video-conferencing can help us highlight the best of CdR's people and our strength in depth. Nevertheless, in any trust-based business, face-to-face meetings are crucial and like all of our competitors, we've found the inability to travel to meet clients frustrating during this time.

As for working practices, working from home, whilst sub-optimal for collective morale and ideas exchange, is a positive for productivity.

What lessons have been learnt that can be carried forward?

There is no need to deviate from a business model that works, even in a crisis.

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

We believe that the diversity of background, gender and skillset together with our investment expertise are the key strengths of our business, whose importance will endure.

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

The frustration of not being able to meet clients has been strongly felt at CdR

across the board. We have bolstered morale with London-style pub quizzes for the staff and (in recognition that productivity remained high despite our staff having to convert their homes into their place of work) have focused on communication with and gifts to the families of our colleagues and partners.

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

We believe that there is a powerful trend in the favouring of independent wealth management. The biggest challenge that we see is the inter-generational succession in both the client base and indeed our industry. The next generation will have very different investment goals (including ESG) and very different needs in terms of connectivity.

Whom do you look to for inspiration and ideas?

We have good relations with many of our peers and competitors. We admire anyone on the same entrepreneurial journey as ourselves.

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

The respect of our peers is important to us. As the industry consolidates, prestigious awards like this have an even greater value. We do however acknowledge that our clients will continue to judge us by the quality of our level of service and their investment returns. ■





WINNER: Finanzlab and DCM Systematic



WINNER: DECALIA



WINNER: Schoeb Frote, Finanzlab and Capitalium Advisors



WINNER: CDR CAPITAL

TAKING A DIFFERENT PATH TO INVESTMENT “ALPHA”

Tom Burroughes, Group Editor at *WealthBriefing*, talks to **Anthony Dearden**, **Jérôme Callut** and **Gaëtan Maraite**, principals of **DCM Systematic Advisors SA**, on how their entrepreneurial thinking and investment approach created success.

DCM Systematic Advisors SA is an independent, quantitative investment manager based in Geneva. It was established in 2014 by its three principals (Anthony Dearden, Jérôme Callut and Gaëtan Maraite), who previously held senior roles at BlueCrest Capital Management and Pictet. The team designed the Diversified Alpha investment strategy with the aim of delivering a compelling set of uncorrelated, absolute returns across a range of market environments. Diversified Alpha implements a non-trend, multi-strategy, quantitative approach using robust scientific methods and advanced risk management techniques. It aims to investigate and exploit a wide range of opportunities.

The 2022 award for best asset manager under SFr500 million comes as Diversified Alpha concludes its sixth year of live trading and follows on from winning best portfolio management team at the inaugural awards.

What sets you apart from your peers and why?

DCM Systematic was founded to allow different ways of thinking about investment management and where convictions, even when unusual, can be expressed. Rather than following the herd to a predictable and crowded position, we seek to anticipate the behaviours of other market participants or look for opportunities which are not commonly explored. We work hard to build a research and development process which is grounded in rigorous scientific methods yet flexible enough to analyse a wide range of opportunities and adapt to the changeable market environment.

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

Employees are vital to the success of any organisation and during the COVID-19 pandemic it has become more important than ever for a team to share the same philosophy. DCM Systematic comprises a variety of professionals with experience from respected and well-known compa-

nies in the wealth management and alternative investments industry who believe passionately in our approach.

What are going to do to stay on the front foot in the fast-moving and competitive industry?

We built DCM Systematic on the premise of consistently striving to improve and having the ability to take advantage of opportunities as they present themselves. While we cannot control our performance on any given day, we can make a commitment to work tirelessly to try to adapt and improve Diversified Alpha to make it more robust and resilient across different market regimes. We also recognise the responsibility that comes with managing external assets and we believe that it is vital to put our clients first.

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

When we set about launching DCM Systematic in 2014, we knew there were significant headwinds which we would have to overcome. Specifically, reaching critical assets under management to be considered institutional. We had a prudent mindset from day 1, focused on our edge and reinvested revenues into the business whenever possible. Six years later, we are thankful to all our clients as we received FINMA authorisation as an asset manager of collective investments in November 2021 and passed \$350 million AuM at year-end 2021.

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

As a quantitative firm we take note of the economic environment, but we don't have to make predictions like our discretionary counterparts. Instead, we aim to have a diverse range of strategies focusing on different sources of alpha and combine these with risk controls and constraints based on statistical analysis and forward-looking scenarios.



Anthony Dearden
Principal, DCM Systematic Advisors SA

Whom do you look to for inspiration and ideas?

Our ideas can come from many different sources; academic literature, published research and even investor conversations. However, with many of our strategies having a behavioural basis, a common starting point for a new idea is to ask the question “How are the big players in the market acting?”

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

We hope that this award, coupled with our recent press release regarding FINMA authorisation and asset growth, can be a catalyst for partnering with more Swiss asset managers as they look for liquid alternatives to diversify their portfolio. We feel this is an exciting opportunity for DCM Systematic as a Swiss firm with a deep understanding of the Swiss market. We have worked hard to build a range of solutions for accessing Diversified Alpha and we look forward to working towards our ambition of being a key player in the systematic space. ■

Disclaimer: The information is for illustrative and discussions purposes only and does not constitute an offering. The views expressed are that of DCM Systematic. Past performance is not necessarily indicative of future results.



INVESTING IN DIRECT MARKETS. INVESTING IN THE FUTURE.

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Decisive, winner of
Wealth Briefings Awards.

DECISIVE__

 **Wealth Briefings** SWISS EAM
AWARDS 2022
DIRECT INVESTMENT PROGRAM TEAM — WINNER —

CURATED APPROACH TOWARDS INVESTING IN NEXT GEN TECHNOLOGIES

Loic Bondiguel, Partner - Private Markets, at **Decisive Capital Management**, talks to **Tom Burroughes**, *WealthBriefing* Group Editor, on what makes the firm special.



Loic Bondiguel
Partner, Decisive Capital Management

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

Decisive is a next generation wealth advisor and under our Curated Investment Management division, we seek smart technology investment opportunities around the world. Created in 2016, Decisive is now a 90 people organisation and growing. It emerged with a completely different DNA compared to the traditional business model used by large corporate wealth managers, which we believe is no longer adapted to best address clients' needs. We understood early on that we did not want to play a brokerage role, but rather an actively involved asset allocator, investing alongside our clients and aligned with them.

Since the beginning, we have developed a strong and specialised internal due diligence capability, rather than relying on external generalist providers or "due diligence on demand", which in our opinion is a recipe for error. As risks cannot be eliminated, our thorough due diligence processes allow us to identify and understand their magnitude, so that we can ultimately find the right risk-return balance. Today our 10-strong and growing Private Markets investment management and due diligence team are spearheading our efforts on that front.

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

We expect nothing but the best. We are tough on ourselves, setting high standards. But it is curiosity and the ability to keep our eyes open to opportunities that

makes the difference. We access deals through a carefully constructed network, apply due diligence processes and ultimately manage private portfolios. We collaborate with all Decisive's experts, in particular the legal and structuring teams. At the end of the day there is no such thing as luck. Accessing these markets is not an exact science and we need to eliminate as many risk factors as possible.

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

- 1) Curiosity, knocking on doors, leaving no stone unturned.
- 2) Getting close to where wealth is created and generated.
- 3) Being part of Smart Capital.

The goal is to invest in companies with ground-breaking technologies and visionary business models. We apply a thorough selection and deep due diligence process as the team looks for loopholes and negotiates investment terms. We then actively follow-up with portfolio companies to be able to provide detailed reporting to our clients. Every single aspect counts: from assessing participations in further rounds to evaluating exit opportunities. On average, Decisive screens more than 500 companies globally every year. Currently, we are invested in FinTech, PropTech, BioTech, SpaceTech, Marketplaces, Renewables, Blockchain, SaaS, AgTech, Mobility and MedTech.

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

What we are doing is not common in Switzerland. That makes the talent pool here very limited, and so we are hiring globally. A second challenge is that these markets often suffer from greed at the late stage. We need to be able to overcome this phase through exhaustive research and due diligence, to access a deal at the right price. We often face challenges with entering local markets, in that allocations to investment opportunities are often primarily given to local investors or supermarket asset managers, leaving non insiders with nothing.

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

I would say that our business has benefited from the pandemic as the hectic public markets together with the low interest environment left investors without many investment alternatives. As a result many shifted their exposure to private markets. As the public markets are now correcting, one has to be more selective in the private markets and focus on sourcing companies with the right business models at the right valuation level.

What lessons have been learnt that can be carried forward?

A lot of tech companies experienced a tailwind during COVID. Selecting companies with solid business models and a clear path to profitability will be key going forward. The lesson learned is that 'the rising tide only lifts all boats temporarily.'

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

Our strong origination and due diligence capabilities have become even more relevant and continue to be so.

What have you done to bolster their spirits?

Continuous communication, empowering people to succeed and fostering team spirit.

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

We see positive impact as a key trend and it is one of our investment lenses. We also see continuous innovation of the segment powered by technology. ■



DIAMOND CAPITAL

50 YEARS

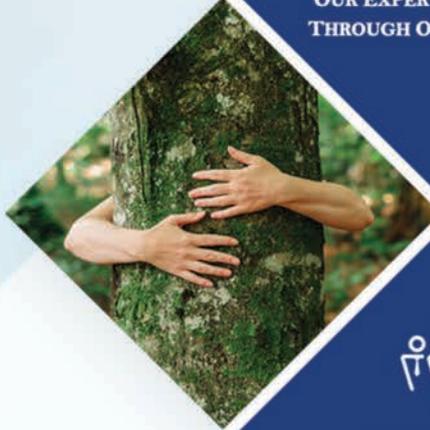
of Asset Management

20 YEARS

of Fund Management



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THROUGH OUR EXPERIENCE



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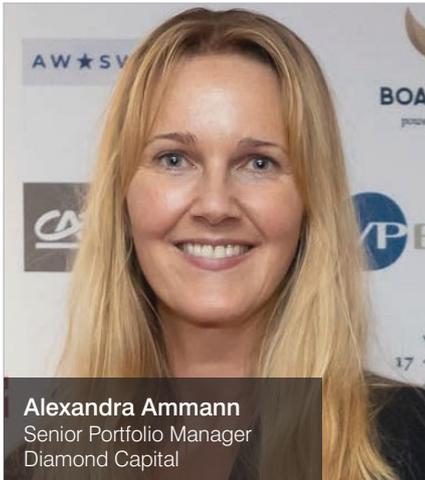
Serving clients in Europe, Middle East and Asia

We invest significantly in research and collaborate with
leading investment institutions around the world

We view our investors as partners, and invest
alongside them in every product we offer

DIVERSIFICATION AND A GLOBAL VIEW BUILD ROBUST RESULTS

Alexandra Ammann, Senior Portfolio Manager, **Diamond Capital**, talks to *WealthBriefing's* Tom Burroughes.



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

The year has started on a difficult tone, with most asset classes trading down as a result of central banks' hawkish stance and the Russia-Ukraine conflict. Whilst we are not immune to these developments, our approach to diversify clients' portfolios with alternative investments has helped to significantly limit the drawdown. Especially the inclusion of fund of hedge funds and real estate backed lending strategies have served their purpose of being uncorrelated and keeping volatility low.

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

Reliability, consistency, and professionalism are what the Diamond Capital Team stands for in all our three locations in Geneva (founded in 1972), Singapore and Tel Aviv. Our international footprint allows us to have a global view of the markets and have access to local information and partners, which is thoroughly shared and utilized across the organisation.

The members of our senior team have been working together for decades, providing outstanding client support over a long period of time, incl. providing stability during the most significant down markets in the last decades. We have a fundamental, bottom-up approach, which is key to thoroughly understand the products we invest in and has allowed us to avoid major capital loss events in the past 50 years.

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

We have been serving our clients since 1972, and we look back to a remarkable 50 years of experience in preserving and building investors' capital. Whilst we are open to new technologies and trends, one of our most fundamental tenets remains to diversify our asset base, to not jump on every new trend, to carefully select our partners and engage with top industry professionals.

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

We have lived through several downturn cycles over the past 50 years, which has led us to grow and evolve from a pure wealth manager into a wealth and asset management company. This has not only forced us to comply with the legal and regulatory requirements of the respective jurisdictions but has significantly strengthened our internal compliance oversight and risk management.

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

Overall, we took a pragmatic approach to adjust and to adhere to the local regulations with regards to the pandemic, be it in Israel, Switzerland or Singapore. We made sure that the employees had the appropriate tools to work from home and stay connected, we have implemented additional security layers to protect sensitive data and have accustomed ourselves with video conferences and webinars to keep clients and employees informed.

Within our fund selection, we have made several investments in new managers, of which we have conducted the entire due diligence remotely.

What lessons have been learnt that can be carried forward?

Paradoxically, the pandemic has had a positive impact on our dialogue, our exchange of information and collaboration within our organisation (which has a global footprint) as well as with our partners and clients.

Have your differentiators become more important to your business?

A significant portion of our investments are made in collaboration with other investment managers around the world or by investing in other funds (via our FoHFs). Face-to-face meetings with these managers are an integral part of our due diligence process, but we had to find other ways to substitute these steps during the pandemic.

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

We have launched several initiatives to make people feel good and keep their motivation high. For example, during the harshest stage, each employee received a large goody bag, full of groceries and non-perishable food plus personalized notebooks for all their children. When we had periods where restrictions were lifted, we organized events, from team lunches to volleyball games and open-air BBQs at the beach.

What are the prospects for wealth management?

The significant declines in the markets since the beginning of the year and exogenous shocks such as the outbreak of the pandemic has showed the investment world quite plainly again how important it is to be diversified and hold alternative investments.

Furthermore, the limitation of traveling and social distancing required managers to create a comfortable infrastructure to keep their investors in the loop.

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

We are excited and honored to have received this prestigious award. This is a testimony to the work of the entire international Diamond Capital Team. ■

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Geneva ▪ Zurich ▪ Lugano

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COMPLIANCE THE SIMPLE,
DIGITAL WAY

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SIMPLICITY AND APPLICABILITY ARE LODESTARS FOR INDIGITA

Achille Deodato, CEO, **Indigita**, explains to *WealthBriefing* why this firm has raised the bar for excellence.

Indigita is the digital arm of BRP Group and turns the leading regulatory and tax knowhow of its parent company BRP Bizzozero & Partners and sister company BRP Tax into innovative technology solutions that enable financial institutions to simplify and automate compliance amid an increasingly complex regulatory environment. With offices in Geneva, Zurich and Lugano, Indigita covers the three main financial centres across Switzerland's language regions.

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

Indigita is all about simplicity and applicability. Rather than selling complex concepts, we're offering turn-key technology solutions that are simple to integrate with existing workflows and platforms, and deliver tangible value from day one. Our focus on simplicity and efficiency further allows us to offer our services at competitive rates. To provide an example of how we simplify things for our clients: Based on a financial instrument's ISIN, our new product and tax suitability solution provides client advisors with instant information on product placement restrictions and tax impact for specific cross-border settings.

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

I have the pleasure of working with an exceptional group of colleagues, who are the driver of our success. What makes our organisation truly unique is our powerful blend of talent. It starts with the profound knowledge of our legal and tax experts, working at our mother company BRP Bizzozero & Partners and sister company BRP Tax. At Indigita, our team of digital specialists builds on this expertise to create technology solutions that are tailored precisely to our clients' needs. Our success also builds on our people's willingness to constantly try out new ways of increasing the benefit for our clients, as well as on their passion to learn and grow. Today's fast-changing regulatory environment is mirrored internally by the agile way in which we collaborate and develop new ideas.

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

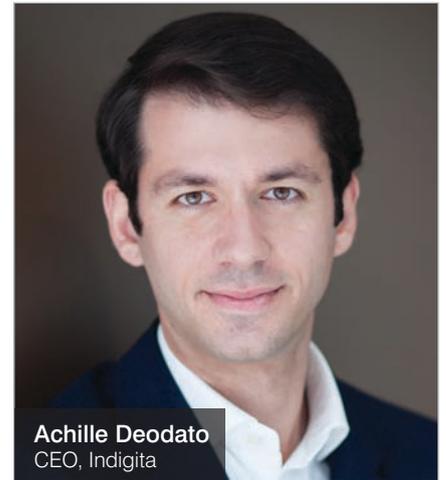
The future of compliance controls lies in artificial intelligence and automation. It's the only way financial institutions can keep a lid on costs in an increasingly strict and complex regulatory environment. That's why Indigita, along with the entire BRP Group, invests heavily in new technology. We're also strengthening our partnerships with key data providers and integrate our solutions with existing portfolio management, customer relationship management and core banking systems to provide clients access to our expertise within their existing processes. And we closely monitor technology and regulatory trends in order to anticipate new client needs and address them early on.

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

It may sound paradoxical, but as a technology company, our first and biggest challenge is to truly understand the challenge we need to solve for our clients. It's easy to fall in love with your own tech, while losing track of the real needs of your clients. The way we tackle this is to start on the regulatory side: What do our clients need to do in order to remain compliant and mitigate regulatory risks? Once we fully understand their regulatory challenges, we create technology solutions that address these challenges in the most simple and efficient way.

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

Wealth management will be facing increasing regulation, more controls and an overall professionalisation of the business. It's similar to what banks have been going through for a while now. This will further accentuate the current consolidation trend, which will see the most competitive institutions emerge as the winners. In this challenging environment, operational and regulatory efficiency becomes imperative for wealth managers.



Achille Deodato
CEO, Indigita

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

Winning this award and having our efforts recognised by a panel of independent experts means a lot to us and spurs us on to further enhance the services and products we provide to our clients. The accolade also underscores the relevance and value of our solutions, strengthens our credibility in the market and serves as a powerful signal to potential new clients. ■

"INDIGITA IS ALL ABOUT SIMPLICITY AND APPLICABILITY. RATHER THAN SELLING COMPLEX CONCEPTS, WE'RE OFFERING TURN-KEY TECHNOLOGY SOLUTIONS."

ASSET MANAGEMENT. SPELT WITH ALPHA.

WHEN IT COMES TO ACTIVE INVESTMENT,
A HIGHER PERSPECTIVE AND A RECOGNISED EXPERTISE
IN TALENT SELECTION MAKE ALL THE DIFFERENCE.

For over 50 years, we have selected and attracted exceptional talents with a proven ability to consistently generate alpha and minimize downturns. This unique expertise is also available through a wide range of investment funds.

DELIVERING ALPHA SINCE 1964.

STRATEGIC MINDSET WITH TACTICAL FLEXIBILITY - THE NS PARTNERS APPROACH

Angel Sanz, CFA – CIO and Head of Asset Management, **NS PARTNERS**, explains why this firm has set the bar for excellence in its field.

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

An independent approach to be able to have blended portfolios with strategic positions to long-term trends but also tactical positions to sectors linked to the world economic recovery.

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

We are a service oriented company focused on personalised services. It might sound a topic theme, but it is important to continue to give a personalised service to all the clients.

For that purpose, NS Partners have created a variety of investment vehicles that will fit the needs of different clients: external funds, internal funds, actively managed certificates, structured products, ETFs, etc. We have the focus to “partner” with our clients and our providers.

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

Invest in the people of our organisation, invest in the digitalisation of the company, and trying to attract talented individuals to join our organisation. A flexible approach to home office will also help to attract and retain the employees.

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

NS Partners have invested and will invest in information technology to increase the productivity of the company and to have a better communication with our client base. We are working on the next generation of employees and managers that will continue to implement the strategies adapting the company to the ever changing environment.

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

We have been following the recommendations of the Governments in terms of home office requirements. In the future we will have a hybrid approach with one to two days office for the people depending on the needs of every department.

The experience of the pandemic has been positive for both the company and the employees. The employees are very happy and productive when they have one or two days of home office and we want to continue to offer it.

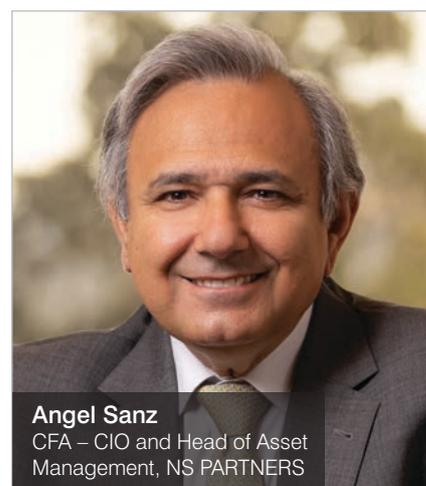
What lessons have been learnt that can be carried forward?

As said before, a certain amount of home office has proved to be efficient for everybody.

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

Morale held up well during the pandemic. No employee had a major health problem either.

The employees were already very motivated and showed a great spirit for collaboration and a good understanding of the challenges we were facing. Nevertheless, frequent zoom sessions were used to keep everybody in touch so we could recreate a “virtual work environment”. ■



Angel Sanz
CFA – CIO and Head of Asset
Management, NS PARTNERS

“WE ARE **WORKING** ON THE **NEXT** GENERATION OF EMPLOYEES AND MANAGERS THAT WILL **CONTINUE** TO **IMPLEMENT** THE STRATEGIES **ADAPTING** THE COMPANY TO THE **EVER** CHANGING ENVIRONMENT.”





WINNER: Schoeb Frôté & Awards Judge: Hassen Jaufeerally, Mauritius Commercial Bank



WINNER: NS PARTNERS



WINNER: SEBA Bank & Finanzlab

SCHOEB FROTE 'S INDEPENDENCE, INVESTMENT FREEDOM SETS NEW STANDARDS

Clément Schoeb, Chief Executive Officer of **Schoeb Frôté SA**, talks to Tom Burroughes from *WealthBriefing* about his firm's award-winning qualities.



Clément Schoeb
Chief Executive Officer, Schoeb Frôté SA

The firm develops solutions that are tailored for clients whether they are families, entrepreneurs or Millennials. The firm tries to simplify the financial lives of clients as far as possible. The organisation is based in Neuchâtel and is part of the F&P Group. The group advises Swiss and international clients on financial and non-financial aspects of asset management and offers Family office services.

Schoeb Frôté won the category of specialist wealth management categories - Family Office Proposition in the *WealthBriefing* Swiss 2022 Awards.

What sets you apart from your peers this year?

Company wise, we stick to our objective to offer a value-adding platform for wealthy families looking to set-up a robust financial strategy. As an independent structure, we benefit from an absolute freedom to shape tailor-made solutions. On the investment side, the differentiation states in our ability to develop solutions outside the crowded listed markets. Again, the decision we made to exclude "retrocessions" from our business model creates a pipeline of unique opportunities.

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

We maintain a start-up-like environment through a culture of innovation. We work on connecting each member of the team with our mission to transform the wealth management industry and to offer to our clients a unique financial experience. In order to achieve our goals, complementarity of skills and characters has proven crucial to develop the company. Diversity is a key factor.

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

To become an award-winner is not an objective, but rather the consequence of business practices that have been turned into a successful business model. Or, at least, the testimony that you are doing something that is creating some value for your clients. Our vision remains intact and we intend to continue to invest every penny we earn to support our development and attract talented people who share our values and vision.

What have the challenges been in obtaining excellence?

The pursuit of excellence has somehow to connect with a high degree of enthusiasm. It requires a lot of efforts that must be balanced with positive energy in order to be sustainable in time. Besides, we are working every day to secure that our clients support the development strategy. Ultimately, excellence is a relative concept versus your peers, as well as an absolute criteria driving each decision we make.

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

Without any doubts, benchmarks and inspiration come from outside our industry. It is unlikely changes will emerge from within our sector. The vast majority of participants are facing profitability issues and fight for a status quo. As a consequence there is no chance to find any inspiration under these conditions. The wealth management sector has suffered from a lack of governance and entrepreneurship that created inertia. The divergence between outputs that would become commoditised and the one that will protect a high value proposition is getting bigger. We are in the game for the second option!

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

The more people can get to know about our business model and the new standards Schoeb Frôté and its partners Capitalium and the F&P Group are raising, the better.

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

The perception of the industry about what we do is something we do not pay a lot of attention. Only the clients decide whether your value proposition make any sense. In that respect, the award can act as a testimony that we do deserve to have a close look at. ■





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BUILDING A BRIDGE TO THE NEW DIGITAL ECONOMY AT SEBA BANK

Guido Buehler, Chief Executive Officer, **SEBA Bank**, talks to Tom Burroughes, *WealthBriefing* Group Editor, about his firm's accomplishments.



Guido Buehler
Chief Executive Officer, SEBA Bank

The firm is a FINMA licensed Swiss Bank that acts as a bridge to the new digital economy by providing clients with an integrated and end-to-end banking platform for cryptocurrencies and digital assets. SEBA Bank's offering includes a trading and credit platform, digital custody services, investment solutions and asset tokenization. SEBA Bank's clients include banks, asset managers, corporates, family offices and private professional investors.

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

We are proud to be the only fully regulated smart bank with the vision of bridging traditional finance with crypto assets through an institutional grade quality suite of services. It is the first time a regulatory agency such as FINMA has granted a licence to a financial services provider with a core capability in digital assets, and that platform allows us to be a gateway for investors who value regulation, safety, and trust.

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

From our foundation, we strived to build a future-forward talent pool. We want to operate as a bridge between traditional

finance and the digital economy. To do this, we combine expertise in technology, information security, and the crypto economy, and we tie that expertise with some of the best and most innovative thinkers who have driven innovation in banking.

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 keep looking to investors and keep looking to new markets. Our goal remains to be the institutional gateway to the digital assets markets, so we need to continue to innovate and iterate in order to fully meet market needs. Of course, the other side of the coin speaks to our ongoing collaboration with regulators and also through SEBAversity. With regulators we want to ensure everyone has an understanding of the industry. With SEBAversity we want to facilitate a space where we can have open and transparent conversations about crypto-assets and their function in society.

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

We set the bar very high for ourselves. We are an organisation that started with six people in 2018 that grew to a team of 100 people supporting over 25 markets across the globe.

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

Above all we wanted to keep people safe, but we also wanted people to feel confident and comfortable - that meant giving them flexibility. We have always been a digital leader, so adapting to a remote working environment was a relatively seamless process.

From the customer perspective, we learned to do business online. That said, we are looking forward to meeting people in person again. We recently opened an office in Abu Dhabi to better serve our customers in the Middle East. We are also exploring expanding our physical presence across other regions to ensure that

we continue to fully service clients' needs on the ground.

What lessons have been learnt that can be carried forward?

Innovation is in our DNA. The pandemic reinforced our culture of innovation when it arrived and we chose to apply it to all aspects of our business operations. One lesson that we think we can all carry forward from the pandemic is to keep extending that spirit of innovation into all aspects of our organisation.

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

We are extremely proud to position ourselves as the world's first regulated smart bank. That licence from the Swiss Financial Market Supervisory Authority (FINMA) provides investors who are looking to explore crypto assets with a fully regulated and trusted counterparty, who can ensure security, compliance and flexibility at the institutional level.

Collaborating with Swiss regulators at FINMA was just the beginning. We have just received a licence from the Financial Services Regulatory Authority (FSRA) in Abu Dhabi. Our new office in the thriving business and financial district on Al Maryah Island will serve as a strategic hub for SEBA Bank.

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

The pandemic has shown us how resilient we are as a team. It also showed us how quickly we are able to act as a collective when called upon. None of the success of the past two years would have been possible without the amazing resilience and morale of our team. ■





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TEAM SPIRIT MAKES DECISIVE DIFFERENCE FOR TELOMERE CAPITAL

Dominique De Riaz, CEO, **Telomere Capital SA**, explains to Tom Burroughes, Group Editor at *WealthBriefing*, on the firm's progress.



Left to right: Anaïs Stämpfli, Petra Kordosova, Dominique De Riaz, Jérôme Tobler, Aurélien Guzzo, Stéphane Gheung, Elizabeth Jacquier and Hugo Dery

Telomere Capital SA is a Swiss company created in 2015 and based in Switzerland. Since our creation, we have developed a network of skills and knowledge specific to Switzerland. Our clientele, 80 per cent of which is made up of Swiss clients, is the best demonstration of this. Important values are what we rely on and what make us grow. Values such as respect, ethics, excellence, and performance. Values which drive us and which have been inscribed in the DNA of Telomere Capital since its incorporation. We are also one of the few independent management companies in Geneva to offer all the necessary expertise to meet the requirements of an individual, a foundation, or a family.

What sets you apart from your peers this year and why? How have your colleagues contributed towards the success of your organisation?

People often say that to measure the success of a business or a team, you need to look not just at the bottom line but at the satisfaction of its clients. At Telomere, we believe that team spirit is a key component of success. You can truly speak of team spirit and cohesion in a group only when each member enjoys being together and if they collaborate and act in harmony to achieve their common goals. Each and every staff member is

determined to contribute towards the success of our business, striving to take an active part therein: listening to our clients, understanding complex problems and responding within 24 hours, but also either applying their own technical expertise or seeking the expertise of other members of the team. Our clients are in touch not only with their account manager, but they are also in touch with our entire team. Each staff member role and name are known by our clients. Moreover, we manage a limited number of families, allowing us to guarantee high-quality services and high availability.

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

Indeed, our region is under constant development and competition has increased through the years. To keep staying on the front foot we must continuously develop and constantly change. This involves training our staff, implementing new electronic tools or integrating new processes. In our view, these are fundamental elements of our growth and thereby allow us to remain competitive with our peers. However, active recommendation from our customers is, for us, the most important source of growth. Our growth is linked to customer satisfaction, our greatest ambassadors. Winning the best customer service award

for the second consecutive year confirms the quality of our service.

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

This year we are extremely proud to have participated in this competition and to have been named the best "EAM assets between SFr500 million – SFr1 billion AUM", "Client Service", "Innovative use of technology" and "Client reporting". For us, this is the illustration of our hard work in recent years.

The awards serve as guarantee for our clients, peers and partners on the high range of skills at our disposal. These prizes were won as part of a team, with each of us having contributed towards this success, of which we are extremely proud. We will promote these accolades among our partners, existing and prospective clients, in the hope that this will reinforce their trust in us. For us, the satisfaction of our customers remains our biggest reward. This award gives us confidence in how we do things. ■



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A CLEAR, PROVEN ASSET MANAGEMENT STRATEGY DELIVERS

Daniel Frauenfelder, Managing Director, **Thalmann & Verling Trust reg.**, talks to Tom Burroughes, Group Editor of *WealthBriefing*.



Daniel Frauenfelder
Managing Director
Thalmann & Verling Trust reg.

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

At Thalmann & Verling reg we have a clear opinion on the long-term development of the equity markets. We invest with a time horizon of three to five years. So it can also happen that we act one calendar year behind the equity benchmarks. Ultimately, however, we invest in sectors and managers in which we still want to be invested in five years' time. Last year, we won the *WealthBriefing* award for the best asset manager in Liechtenstein 2021.

Our strategy proved to be right and we were able to generate exceptional returns for our clients in 2020. In 2021, we remained true to our investment philosophy.

We believe that there are many alpha drivers, provided they are given the necessary time. We see investing always close to the indices as not very opportunistic. Moreover, these strategies have to be implemented by banks and large institutional clients. This is precisely where we see a clear advantage for small, independent asset managers. We can act completely independently, which means that we do not have to consider any bank-owned products or other dependencies on products in our portfolios.

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

I tell them every day how great they are. Without them, our success would

be impossible. The DNA, or the long-term philosophy in our company is very important. All colleagues have the same core values, this is the most important quality for a team to function compactly, efficiently and customer-oriented! If a deal is only right for our own coffers, but not for our client's coffers, the deal will not be made.

This creates priceless trust with our customers. That's why we lose virtually no clients and continue to expand our customer base. It is also very important to inform the employees about the strategy of the company and to get them on board. Only if they understand why we make this daily effort, they will stand behind the company and thus contribute to the long-term success of the company!

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

Be different and better! We are convinced that our proximity to our customers will be a decisive advantage also in the future. Especially in bad times, with difficult stock market situations and poor returns, it is important to inform the customer and to bear the bear market with him. We are also convinced that our sustainability strategy will be even more successful in the future. ESG (environmental, social, governance) will remain the topic in the financial industry in 2022. Especially in today's times of global warming, wars in Europe and other socially critical issues, these topics will also shape investment decisions on the stock markets. That is why we started sustainable asset management years ago and have continued to expand it.

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

Only five years ago, interest in ESG was very subdued. Few financial intermediaries were addressing the issue, let alone embedding it in their corporate philosophy. Today, we know that the financial world can no longer be imagined without this topic. EU regulations are being adopted more and more and anchored in the laws, whether you like it

or not! It is only a matter of time before ESG-involved asset management becomes standard in our industry. We are making a great effort here and are convinced that dealing with this challenge will pay off in the coming years!

Whom do you look to for inspiration and ideas?

Actually, with the same people as in the last 20 years. Although sustainability "experts" have mushroomed recently (thanks to the mainstream and greenwashing), I usually discuss my ideas with old companions, i.e. people who were already thinking about sustainable investment when there was no money to be made!

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

We are convinced that this is another step towards proving our competence in the field of sustainable investment. We will continue to expand our expertise and show our clients and potential clients that sustainable (ESG) asset management is not only important for our children, but that we can also minimise many risks with a clever integration of these issues. It is our goal that we become the leading asset management company in our region in terms of ESG. ■





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DILIGENT INVESTMENT APPROACH SHINES AT THE FORUM FINANCE GROUP

Egon Vorfeld, Managing Partner, **The Forum Finance Group SA**, talks to Tom Burroughes at *WealthBriefing* on how this business makes a difference.



Egon Vorfeld
Managing Partner,
The Forum Finance Group SA

The Forum Finance Group was founded in Geneva in 1994 to serve a global clientele of private clients with comprehensive wealth management services: including asset management and estate planning. Our assets under management now exceed SFr2 billion, serving more than 350 clients. Our clients are primarily based in North Western Europe, including UK and Switzerland and in North and Latin America.

Our mission is first and foremost to invest our clients' capital in the best possible way, taking into account their individual situation. This is why most of our employees are not salesmen, marketers or back-office clerks, but rather seasoned investment professionals (private bankers, wealth planners, research analysts, etc.) with many years of experience.

We primarily select third-party funds, which have been subject to a stringent inhouse due diligence process and an independent forensic due diligence review by a third-party. We have model portfolios and approved fund lists which serve as a solid base for our account managers to work from and provide the flexibility to serve each client the best way possible.

Most UHNW clients have accounts in several private banks, as well as other assets such as collectibles, works of art or real estate. This makes it difficult for them to have a clear idea of their overall wealth,

of its allocation by asset class, country or currency, and of the risks involved. This is why, in addition to the investment management services, we also offer an efficient multi-bank consolidation service, which can include our clients' non-bankable assets. These consolidated reports provide them with an overview of all their assets, their costs and performance, irrespective of at which bank they are held at or what they are.

We work with more than 10 of the highest quality custodian banks in four jurisdictions. This means that we are totally agnostic to our clients' choice of custodian. We are among the banks' favourite counterparties thanks to our long-established relationships (25 years and more) and our strong corporate governance (FINMA & SEC).

Our decision more than 5 years ago to become authorised directly by FINMA as an asset manager and registered with the SEC as an investment advisor still sets us apart from most of our peers who are facing the current regulatory changes.

We have spent a lot of time and invested heavily to ensure that we have very robust CRM and PMS systems. These are crucial if one wants to grow and live up to the standards set by our regulators, as well as our own, and meet our clients' needs and expectations...

To expand our services for our Swiss clients we added the management of private Swiss pension plans to our offering. This service is typically only offered by the banks and requires FINMA approval.

We have expanded our investment universe further in private placements and private equity investments as clients have become more interested and the relative return opportunities more evident in this low interest rate environment.

The highly cooperative culture we have fostered at Forum Finance incentivises all of us to invest in our common future and to work together to face any challenges as partners and colleagues. This team spirit has been our most important facet.

As regulatory requirements increase and clients demand more complex

investment and reporting services, the Swiss independent asset managers industry is undergoing a consolidation process. In this respect, we have a convincing and appealing value proposition that allows us to attract smaller independent asset managers or private bankers who want to become independent.

A clear agreement was also entered into to ensure the retiring partner's equity automatically becomes available to the younger generation. This provides real clarity to all (old and young). Too many firms leave these problems to be resolved to the time they arise. We were quite unique in addressing them early and having them in place at the outset. This is a key factor as it makes access to the partnership easier for younger wealth managers.

The visionaries of a bygone era that considered their colleagues and employees as their most valuable capital and had serving their clients' needs as their sole objective are our inspiration.

Receiving the *WealthBriefing* Award for Swiss EAM with assets over SFr1 billion for a second consecutive year and also receiving the award for investment process is testament to more than 25 years of hard work and dedication by our current and former employees in an evolving industry and we appreciate it hugely.

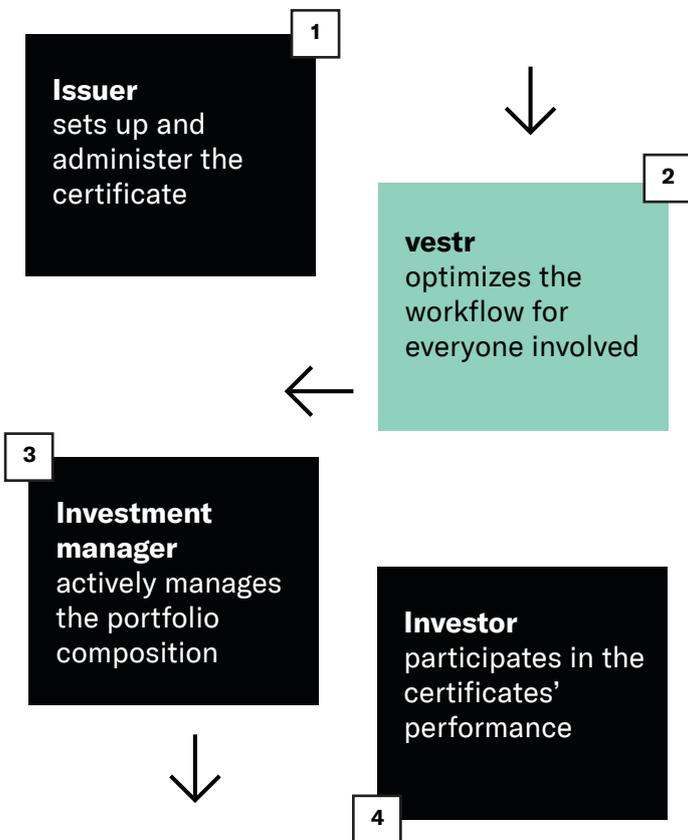
We want to grow our human capital and are actively looking for service minded people who would like to join a company that has the regulatory and corporate structure in place with a cooperative culture that inspires long term commitment. ■





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DIGITAL PORTFOLIO MANAGEMENT HAS NEVER BEEN SO EASY

Rico Blaser, Co-Founder & CEO, **vestr** talks to Tom Burroughes, Group Editor at *WealthBriefing*, about the firm's success to date

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

vestr has built the first end-to-end digital platform to solve the industry challenges by digitising the value chain lifecycle of actively managed investment products. We provide a white-labeled Software as a Service (SaaS) that allows institutional market participants to actively manage investment products during the product lifecycle.

Compared with a traditional manual process, it not only significantly reduces set-up time by an average of 98 per cent, but also reduces the email exchange in line with setting up the AMC from about 300 emails per AMC to zero. In sum, setting up managing an AMC has become considerably more time efficient: a reduction from eight working days to 0.2 working days is possible with the vestr platform.

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

Our DNA is digital – both our product and team culture are built and grown with digital first in mind. This allows us to stay flexible while also including new team members and their ideas into our everyday work. From issuing AMCs to implementing quantitative models, our knowledge spans across the entire spectrum and we share what we know with one another.

We have grown rapidly from a co-founding team of three to a 30+ headcount across European Union, Switzerland and Singapore. Be it new design ideas for our platform interface or new seamless

processes for our client support, we trust in the expertise of our colleagues and thus encourage dynamic exploration and implementation of new work practices.

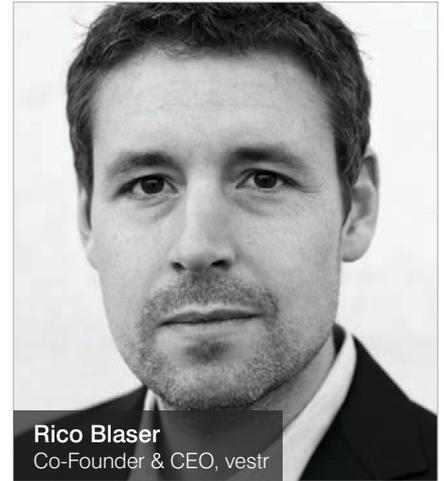
What are you going to do to stay on the front foot in a fast-growing but also challenging region such as this?

The initial offering focused on Actively Managed Certificates (AMCs), but the technology is also applicable to other investment products, including funds, managed accounts, indices, direct indexing, total return swaps, crypto currencies, and others.

We built proprietary technology designed to be connected to financial market structures (FIX, public API). Therefore, we are in the position to build a full digital ecosystem for active investment management. Our platform can connect to third-party complementors such as independent brokers, market data, ESG and index providers, rating analysts and custodians.

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

One of the key achievements in 2020 during the pandemic was the addition of platform features that significantly lower the barrier to entry for new clients by offering a plug-and-play solution that can be taken live within a few weeks rather than going through a full integration cycle right away. This provides our clients with the flexibility to decide which services require a deep integration up-front, trading off up-front efforts and costs for initial operational overhead.



Rico Blaser
Co-Founder & CEO, vestr

What lessons have you learned that can be carried forward?

In a two-sided investment market, with legacy technology at large institutions, we creatively balanced customisation and scalability of our solution. With our industry experience as derivative traders, we have a solid understanding of our clients' requirements. This allows us to offer them the full SaaS spectrum; from a simple setup to get started quickly, to a full integration with fully automated processes. ■



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- OVERALL DIGITAL ENGAGEMENT - IN-HOUSE
- FEMALE EXECUTIVE

 **WealthBriefing** SWISS EAM
AWARDS 2022



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A RELENTLESS DESIRE TO IMPROVE AND KEEP THINGS SIMPLE

Jamie Vrijhof-Droese, Managing Partner, **WHVP**, talks to Tom Burroughes, *WealthBriefing* Group Editor, about what has made her firm stand out.



Jamie Vrijhof-Droese
Managing Partner, WHVP

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

Our hunger and desire to get better. We are thriving on opportunities to increase the service that we are providing. We believe that by putting the client and their experience in the centre of everything we do we are able to create an experience for them that sets us apart from our peers. That can be in the form of digital content for them to better understand financial topics or our swift and friendly communication. Our team is the foundation of all our success. While we are all very different, what unites us is our desire to do financial services differently. To talk to clients on eye level, to explain what we do and not make it artificially more complex than it is. While every single member of our team has different strengths, weaknesses and passions, we are all united in the wish to become the best possible financial service provider we can be.

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

Absolutely! This is the second year in a row that we have won the award for the best digital communication (in-house) and we have only just started being really active online at the beginning of the

pandemic. The majority of our new clients this year came directly from those efforts and this is certainly something that we are going to continue to nurture and grow in the years to come.

What lessons have been learnt that can be carried forward?

To stay flexible, positive and make the best out of every situation. Working in the cross-border business and not being able to travel to our target market the US has been challenging, but it was also an opportunity to think outside of the box and work on things internally that would have not been a priority if business was going as usual.

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

Our differentiators are our unmatched experience and expertise when it comes to US clients as well as our understanding of digital communication. Lastly, we also see our dynamic, diverse and international team as a form of differentiation. All those aspects remain relevant and are even becoming more important considering how the demographic of wealthy clients is changing.

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

The world is changing. Technological developments open up a completely new world of investment opportunities as well as means for communicating with clients. Clients tend to be younger, and women make up a significant part of the people with wealth. All of this opens new opportunities for wealth managers, if they are smart and pro-active in going about them. What will not change is the need for comprehensive and thorough advice when it comes to the complex financial situations of high net worth individuals.

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

Especially for the "Female Executive" Award, we hope that this accolade will shine a spotlight on a young and diverse wealth management team and show young women at the beginning of their career that asset management is for them! This industry needs more diversity of thought and female professionals that are passionate about helping people manage their wealth. ■

"WE BELIEVE THAT BY PUTTING THE CLIENT AND THEIR EXPERIENCE IN THE CENTRE OF EVERYTHING WE DO WE ARE ABLE TO CREATE AN EXPERIENCE FOR THEM THAT SETS US APART FROM OUR PEERS."



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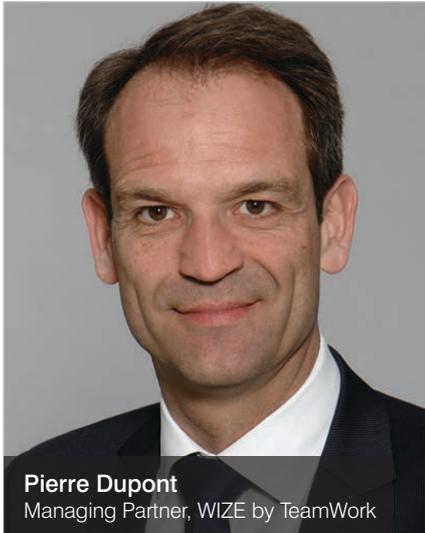
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 **TEAMWORK**

DELIVERING BEST-IN-CLASS SUPPORT TO SWITZERLAND'S EAMS

Pierre Dupont, Managing Partner, **WIZE by TeamWork**, talks about achieving excellence and the hard work in getting there.



Pierre Dupont
Managing Partner, WIZE by TeamWork

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

WIZE by TeamWork, the all-in-one wealth and 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% 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
- 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 3000+ users in 18 different countries, we allow clients to focus on their business while taking advantage of the platform's power and scalability for an attractive All in One monthly fee.

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





WINNER: vestr



WINNER: Woodman Asset Management



WINNER: The Forum Finance Group



THE WEALTHBRIEFING SWISS EAM AWARDS WINNERS 2022

WINNERS: SWISS NATIONAL CATEGORIES (COMPANY)

OVERALL EXTERNAL ASSET MANAGER (EAM)



DECALIA

Wealth Management
Asset Management
Private Markets



ASSETS OVER CHF 1 BILLION AuM

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ASSETS UNDER CHF 500 MILLION AuM



GROWTH STRATEGY

**WOOD
MAN.**



ASSETS BETWEEN CHF 500 MILLION - 1 BILLION AuM



TELOMERE | Capital



NEWCOMER

ITERAM



WINNERS: REGIONAL AND CANTONAL CATEGORIES (COMPANY)

BASED IN ZURICH



alpenpartners



BASED IN LIECHTENSTEIN



BASED IN GENEVA

CdR
CAPITAL





WINNER: Diamond Capital



WINNER: Decisive



WINNER: Thalmann

WINNERS: TEAM-BASED CATEGORIES

INVESTMENT PROCESS TEAM



CLIENT SERVICE TEAM



PORTFOLIO MANAGEMENT TEAM



APRICUS FINANCE



WEALTH PLANNING TEAM



SUSTAINABLE INVESTMENTS PROGRAM



SWISS DOMESTIC TEAM

ALPHASWISS



ESG ENGAGEMENT TEAM



INTERNATIONAL TEAM



DIRECT INVESTMENT PROGRAM TEAM



WINNERS: INTERNATIONAL CATEGORIES (COMPANY)

SERVICING NORTH AMERICAN CLIENTS





WINNER: WIZE by TeamWork



WINNER: Telomere Capital



WINNER: WHVP



WINNER: Indigita

WINNERS: TECHNOLOGY CATEGORIES (IN-HOUSE)

INNOVATIVE USE OF TECHNOLOGY



CLIENT COMMUNICATIONS



CLIENT REPORTING



OVERALL DIGITAL ENGAGEMENT



WINNERS: TECHNOLOGY CATEGORIES (EXTERNAL SUPPLIER)

OVERALL IT SOLUTION PROVIDER



COMPLIANCE SOLUTION



CLIENT REPORTING



PORTFOLIO MANAGEMENT SOLUTION



CLIENT COMMUNICATIONS



DATA PROVIDER



CRM PRODUCT OR SOLUTION



WINNERS: SPECIALIST WEALTH MANAGEMENT CATEGORIES

FUND SELECTION/ASSET ALLOCATION OFFERING



DIGITAL ASSETS OFFERING OR SERVICE



NEXT-GEN PROGRAMME



THEMATIC INVESTMENT PROPOSITION OR STRATEGY



FAMILY OFFICE PROPOSITION



WINNERS: LEADERSHIP-BASED CATEGORIES (INDIVIDUAL)

CHIEF EXECUTIVE OFFICER

Mathieu Saint-Cyr



THOUGHT LEADERSHIP

Daniel Frauenfelder

THALMANN  VERLING

Ihre unabhängige Vermögensverwaltung seit 1994



FEMALE EXECUTIVE

Jamie Vrijhof-Droese



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

 **WealthTechAmericas**
AWARDS 2022
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 **WealthBriefingAsia**
AWARDS 2022

 **WealthBriefing SWISS EAM**
AWARDS 2022

 **WealthTechAsia**
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 **WealthBriefing EUROPEAN**
AWARDS 2022

 **WealthBriefingAsia EAM**
AWARDS 2022

 **WealthBriefingAsia GREATER CHINA**
AWARDS 2022

 **WealthBriefing MENA**
AWARDS 2022

 **FAMILY WEALTHREPORT 9th ANNUAL**
AWARDS 2022

 **WealthBriefing CHANNEL ISLANDS**
AWARDS 2022

 **WealthForGood**
AWARDS 2022
Global Awards by WealthBriefing

 **WealthBriefing SWISS**
AWARDS 2023

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