



# ACCLAIM

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

**WINNERS OF THE  
WEALTHBRIEFING  
CHANNEL ISLANDS  
AWARDS 2022**

December 2022

# SIMPLIFYING LIFE'S FINANCIAL CHALLENGES

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## FOREWORD

**Tom Burroughes**, Group Editor of *WealthBriefing*, explains the significance of these awards.

The inaugural *WealthBriefing* Channel Islands Awards are held to recognise achievements of top-notch practitioners in Jersey and Guernsey. Home to some of the world's most experienced wealth management figures, the Channel Islands remain as relevant to the global world of international financial centres as ever. In a politically unstable world, and where financial markets have been volatile, the need for clear and calm advice has never been more important.

The awards recognise firms and individuals who don't just meet the needs of clients but anticipate what clients will look for in the future – and work out the kind of business models and service offerings that will work. The entrepreneurial flair of wealth managers is a quality that needs to be celebrated.

The organisers of this news service's awards programme know how much those who take part value them. They are valuable for firms and people as marketing tools and ways to construct brands. *WealthBriefing* takes great pride in how this programme also gives the editorial and commercial teams a chance to build on existing relationships and forge new connections.

The Channel Islands have been steadily building a reputation for quality and stability over many years, and as editor, I am delighted that the time has now arrived for us to celebrate that work.

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## OVERVIEW OF THE CHANNEL ISLANDS' WEALTH MANAGEMENT SECTOR

Jersey and Guernsey, both UK Crown Dependencies with links to the UK but an autonomous political and legal life, are arguably as important parts of the IFC chessboard as they have ever been.

According to Boston Consulting Group, the Channel Islands (and the Isle of Man, the third Crown Dependency) held \$600 billion of cross-border wealth in total in 2021, putting them behind the US (\$1.1 trillion) and on a par with the United Arab Emirates, and ahead of the UK (\$500 billion); Luxembourg (\$400 billion); Monaco (\$300 billion), and Liechtenstein (\$200 billion). Switzerland, by the way, has \$2.5 trillion of cross-border wealth, making it still the biggest in this league by far.

In Jersey, the number of live companies on the register stood at 34,671 at the end of the first quarter of 2022 and the net asset value of regulated funds

under administration increased by £9.1 billion (\$10.5 billion) from £450.2 billion to £459.3 billion during Q1 2022; the total value of banking deposits held in Jersey increased from £133.5 billion to £136.15 billion during Q1 2022. A total of 20 banks are licensed in the island (source: Jersey Finance). Licensed banks in Jersey include Citibank, Investec, Lloyds Bank, EFG Private Bank, BNP Paribas, Royal Bank of Canada, Nedbank Private Wealth, Standard Bank, Santander, and Union Bancaire Privée.

In Guernsey, the total net asset value of Guernsey funds increased in sterling terms during the first three months of 2022 by £6.0 billion to £309.6 billion. Over the past year, total net asset values rose by £45.9 billion. There are 23 licenced banks. Several of the banks in Jersey, although not all, also have offices

in Guernsey, and include Bank J Safra Sarasin, Barclays, Julius Baer, Banque Cantonale Vaudoise, BNP Paribas (Suisse), Butterfield Bank, Credit Suisse, EFG, FirstRandBank, HSBC, Investec, SG Kleinwort Hambros, Rothschild & Co, Lloyds, and Northern Trust.

These IFCs have had to adapt. Even before the 2008 financial crash, these islands knew that the winds were blowing harder against places deemed to be a soft touch for illicit money. They have had to tighten controls and reinvent value-added propositions.

Over the past 40 to 50 years, so many firms such as banks, law practices, fiduciary service providers and trust companies have set up in the Channel Islands that a "clustering" momentum of its own has developed, much as Silicon Valley achieved after WW2.

# RECENT RESEARCH OUTPUT

**FAMILY WEALTH REPORT**  
North American Family Office Intelligence

**WealthBriefing**  
News Insight Intelligence

## Why Wealth Managers are the Ultimate Private Market Matchmakers

(in partnership with Hywin Wealth & VP Bank)

This report tackles both the supply and demand for private market opportunities in both the Asia-Pacific region and globally, a topic which will continue to be hugely important for the wealth management industry as H/UHNWs seek enhanced returns and diversification in a challenging investment environment and billions of "dry powder" await deployment.

## External Asset Managers in Asia - 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: An Update of the Industry's Efficiency in Accounting and Investment Analysis

(in partnership with 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.

## Virtuous Circles: Sustainable Family Governance Models in an Evolving Environment

(in partnership with Jersey Finance)

Essential reading for UHNWs and their advisors, this report unites the findings of a global survey of practitioners and the views of a panel of experts drawn from leading firms, but perhaps most interestingly of all, the paper features a wealth of real-world examples illustrating what forward-thinking families are doing to create lasting legacies.

## Winning Women in Asia-Pacific

(in partnership with VP Bank & 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/UHNWs and their advisors right across the region.

## Technology & Operations Trends in Wealth Management 2022

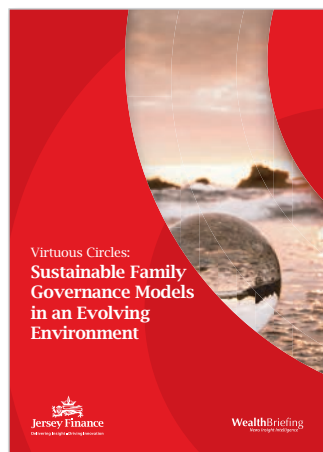
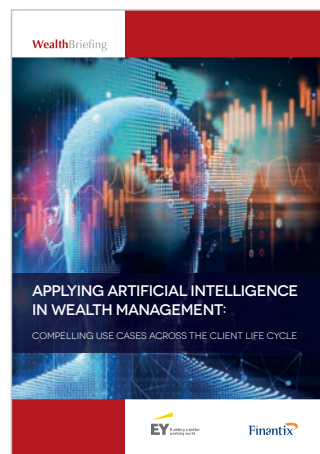
(in partnership with SS&C Advent)

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 2022

(in partnership with EY)

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

The 2022 *WealthBriefing* Channel Islands Awards programme was focused around three main category groupings: **experts** (individuals and teams), **products** and **services** for wealth managers and clients, and institutions of all sizes and types in the Channel Islands region.

**Independence, integrity** and **genuine insight** are the watchwords of the judging process with the judging panels made up of some of the industry's top trusted advisors and bankers.



**MICHAEL BETLEY**  
Managing Director  
Ocorian



**TOBY BIRCH**  
Senior Investment  
Manager  
Gower Financial  
Services



**STEVEN BOWEN**  
Managing Director  
Jersey & Head of  
Channel Islands  
ZEDRA



**NICK CAWLEY**  
Global Head - Private  
Clients  
Ocorian



**ZOE COUSENS**  
Vice President,  
Global Funds  
Northern Trust



**STEVE DYSON**  
Director  
Investment & Wealth  
Management  
Consultants



**JAMES FLEMING**  
Vice Chairman  
VAR Capital



**MICHAEL GIRAUD**  
Head of Fiduciary  
Services  
Standard Bank Group



**MARTIN HEALE**  
Director  
Schroder US Wealth  
Management



**SEAN KIERNAN**  
CEO and Founder  
Greengage



**PHIL MCILWRAITH**  
Branch Manager  
SG Kleinwort Hambros  
Bank Limited  
- Jersey Branch



**ROBERT MONTICELLI**  
Senior Director - Private  
Client Services  
JTC



**PETER NIVEN**  
Independent Non  
Executive Director  
Various



**ANDY SMITH**  
Head of the Jersey  
Branch & Head of Trust  
and Corporate Banking  
Investec



**BRUCE WEATHERILL**  
Chief Executive  
Weatherill Consulting



**IAN WOODHOUSE**  
Lead Wealth Management  
Business Model  
Transformation and  
Thought Leader (Europe)  
Accenture



## YOUR PRIVATE CLIENT PARTNER IN THE CHANNEL ISLANDS AND AROUND THE WORLD

We are proud and honoured to have received the 2022 WealthBriefing Channel Island awards for 'Trust Company ESG Programme' and 'Trust Company Employer of the Year'. We would like to thank our clients, colleagues and partners who have contributed to our success.



## LEADING TOGETHER

At JTC, shared ownership is at the heart of our culture, with all employees being owners of the business. As an organisation, we are committed to creating an environment where all stakeholders have the opportunity to thrive and reach their maximum potential.

We recognise our responsibility to conduct our business in a sustainable way, respecting the natural environment and creating a positive impact within the communities where we live and work.



C. 200  
BILLION  
USD  
GROUP  
AUA





# Traditional values. Progressive approach.



**Independent. Privately owned.**  
**Private client focus for over 90 years.**

Wealthy individuals, their families and family offices have entrusted us with oversight of their offshore structures over many generations and this year we were very proud to pass the 90 year milestone of providing trust services. Our people are at the heart of everything we do and traditional values mean that we treat our professional and qualified team as individuals and this stability ensures the service levels our clients have come to know and expect from Alex Picot Trust.

Independence and a rich Jersey heritage that has stood the test of time differentiates us from other trust companies and being privately owned by our current, and former, directors ensures our decision making is always client-centric and that our commitment to the long-term remains in place.

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**Steve Gully**

Director

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Alex Picot Trust is a registered business name of Alex Picot Trust Company Ltd and is regulated by the Jersey Financial Services Commission to conduct trust and company business.



# AWARDS MAKE FIRMS MORE VISIBLE TO CLIENTS AND COLLEAGUES

Steve Gully, Director, **Alex Picot Trust Company Ltd**, talks to *WealthBriefing* Group Editor Tom Burroughes.

## How do awards such as this make a difference to your firm and your colleagues?

People work harder in the post-Covid world, with many of those hours often unseen by fellow colleagues.

Recognition for an individual is due to the support provided from their firm and colleagues especially in a highly competitive, award winning and tightly regulated jurisdiction such as Jersey.

Recognition for Alex Picot Trust through awards by credible bodies such as *WealthBriefing* are extremely important and are a validation of the approach taken by us as a firm and individually.

To be named in the inaugural *WealthBriefing* awards is hugely appreciated by our team.

Our approach and style differentiate us in our sector, receiving recognition for this positioning instils a sense of shared pride among our team and continues to fuel their passion and enthusiasm.

For clients, they view awards and accolades as positive reinforcement of the solid reputation that we garner in the offshore private client sphere and gives them comfort that the strength of our individuals and their professionalism is applauded by our peers.

## Where in the world do you operate – are you mainly a domestic player or international?

Alex Picot Trust has its entire operation based in Jersey and it's our intention to continue with this approach for the future.

The firm's heritage dates to 1885 and its first record of trust services commenced in 1932.

The more acute of those reading this will be aware that back then, Jersey had not yet embarked on its journey to becoming an IFC. As Jersey became a location for offshore trustee work the Alex Picot business was well placed to expand its offering into the international space.

Today, the business provides services to international, and Jersey-based clients.

The ability for Jersey based clients to drop in and see us at any time ensures we always need to be prepared and available for our clients and this mindset has translated exceptionally well how we serve our international client base.

## What position would you like your firm to hold in its sector in five years' time?

We are immensely passionate about our business and strive to be regarded as Jersey's best Private Client Trust Company.

## Why is this important to us?

Firstly, it's important to define what best means. By best we want Alex Picot Trust to be the name people think of when they consider which private client trust company that they want to be working for.

We want to be a name that advisors, intermediaries and existing clients think of when recommending a trust company; particularly if dissatisfied with their existing trustee and looking for a change of service provider.

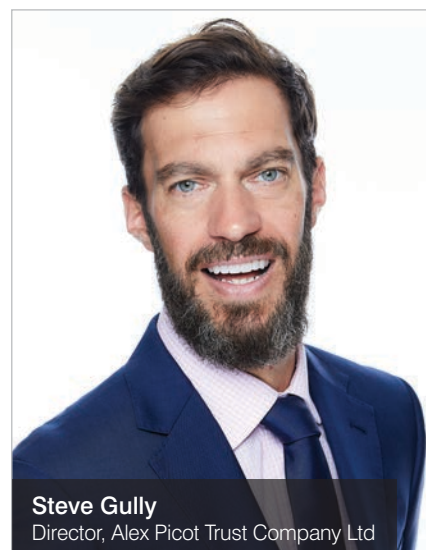
It is also important to be clear about what metrics are not relevant to this definition. This is not measurable by being the biggest, most profitable, fastest growing firm or by targeting low debtor day numbers or focusing on achieving high margins etc.

Our wish to be recognised as "best in class" is underpinned by the strategy of achieving strong organic growth of new clients and new people to look after them.

## Please explain what you think makes your firm successful in its chosen field.

As an owner managed business and one that operates from a single jurisdiction this gives us the ability to be nimble and slick in how we operate and with our decision making, and this feature is one that we use as frequently as possible.

The owners of the business are those running the business. That is a key differentiator. ■



**Steve Gully**  
Director, Alex Picot Trust Company Ltd

"OUR WISH TO BE **RECOGNISED** AS "BEST IN CLASS" IS UNDERPINNED BY THE **STRATEGY** OF ACHIEVING **STRONG ORGANIC GROWTH** OF NEW CLIENTS AND NEW PEOPLE TO **LOOK** AFTER THEM."





# Barclays Investments

Using local investment expertise, and the power of the Barclays Group, to bring global opportunities to the Channel Islands.



Barclays offers private and overseas banking, credit and investment solutions to its clients through Barclays Bank PLC and its subsidiary companies. Barclays Bank PLC is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register No. 122702) and is a member of the London Stock Exchange and NEX. Registered in England. Registered No. 1026167. Registered Office: 1 Churchill Place, London E14 5HP. Barclays Bank PLC, Jersey Branch has its principal business address in Jersey at 13 Library Place, St Helier, Jersey and is regulated by the Jersey Financial Services Commission. Barclays Bank PLC, Isle of Man Branch has its principal business address in the Isle of Man at Barclays House, Victoria Street, Douglas, Isle of Man and is licensed by the Isle of Man Financial Services Authority. Barclays Bank PLC, Guernsey Branch has its principal place of business at St Julian's Court, St Julian's Avenue, St Peter Port, Guernsey and is licensed by the Guernsey Financial Services Commission under the Banking Supervision (Bailiwick of Guernsey) Law 1994, as amended, and the Protection of Investors (Bailiwick of Guernsey) Law 1987, as amended. Each Branch places funds with other parts of Barclays Bank Group and thus financial standing is linked to that of the Barclays Group. Publicly available information, including reports and accounts, can be found at [www.barclays.com](http://www.barclays.com). Deposits made with Barclays Bank PLC are only covered by the scheme in the jurisdiction where the account is held. Your eligible deposits with Barclays Bank PLC in London are protected up to a total of £85,000 by the Financial Services Compensation Scheme, the UK's deposit guarantee scheme, details are available at [www.fscs.org.uk](http://www.fscs.org.uk). Barclays Bank PLC, Jersey branch is a participant in the Jersey Banking Depositor Compensation Scheme. Full details of the Scheme and banking groups covered are available on the States of Jersey website [www.gov.je/dcs](http://www.gov.je/dcs) or on request. Barclays Bank PLC, Guernsey Branch, is a participant in the Guernsey Banking Deposit Compensation Scheme. Full details are available on the Scheme's website at [www.dcs.gg](http://www.dcs.gg) or on request. The Schemes in Jersey and Guernsey offer protection for eligible or qualifying deposits up to £50,000, subject to certain limitations. The maximum total amount of compensation is capped at £100,000,000 in any 5-year period. Deposits made with Barclays Bank PLC, Isle of Man Branch are covered by the Isle of Man Depositors' Compensation Scheme as set out in the Depositors' Compensation Scheme Regulations 2010.

# IMPROVING EFFICIENCY AND INSIGHTS TO DELIVER INVESTMENT SUCCESS

**Simon Smith**, Head of Overseas Investments, **Barclays Private Bank**,  
talk to **Tom Burroughes**, *WealthBriefing* Group Editor,  
about the firm's accomplishments.



**Simon Smith**  
Head of Overseas Investment,  
Barclays Private Bank

## Please explain what you think makes your firm successful in its chosen field?

To achieve success amid market volatility and geopolitical upheaval, we focus on three core areas.

Our first priority is to address the changes in the investment environment and in our clients' expectations. We achieve this through honest, consistent communication, and listening to our clients' needs before responding with broad solutions and services that address these needs.

Recent examples include the introduction of behavioural finance education to help our clients understand the role that psychological factors can play in investment decision-making during periods of market stress.

Our second priority is to improve our clients' efficiency, which could potentially enable them to achieve better outcomes from their wealth. We understand that our clients expect, and deserve, a high level of expertise when it comes to accessing investment opportunities and monitoring markets.

To deliver on what can be a resource-intensive task, we assemble teams from across asset classes, geographies, sectors and service providers. As a result, we hope to meet our clients' preferences, reveal market opportunities, and manage risk more effectively. Our goal is to allow the portfolios we manage to enjoy optimum diversification, decorrelation, and of course risk adjusted performance.

Our third priority is to deliver world-class diversity of thought. Having access to diverse perspectives from across different sectors strengthens our ability to meet our clients' growing needs. Our investment options cover DPM, Execution Only, and Advice across equities, private markets (for sophisticated investors), credit, macro, funds, capital markets, and structured products.

The breadth of thinking that exists among our team of specialists can also help prevent biases in geography, products, or style. A free-thinking environment challenges opinions and preconceptions, creates fresh perspectives and helps teams stay focused during periods of change.

## What are your main contributions to the wealth-management industry?

With global experience gathered across 40 countries and local expertise in the Channel Islands, we bring a unique understanding of the challenges and opportunities facing our clients.

Whilst the Channel Islands environment remains attractive, complexity is rising, and the growth of the global offshore wealth management industry runs in parallel with challenging and large-scale change. However, this doesn't justify knee-jerk reactions and, as financial markets continue to evolve to reflect client's needs, we strive to identify new ways to take our industry, and our islands, forwards.

Balancing our overarching duty of preserving wealth in real terms with building strategies personal to our clients' specific needs is critical. In addition to the capabilities of the wider Barclays Group, we provide global solutions locally across multiple asset classes, which we implement and scale within a well-governed Channel Islands framework.

These opportunities would not normally be made available to our island communities, and this is something I'm incredibly proud of.

## Can you describe the philosophy that best sums up your firm?

We would summarise our overall philosophy as investing with high conviction and low cost over the long term.

To achieve stewardship of capital, we hold high-quality assets over a long period and diversify these globally across classes, currencies and sectors.

Active management also allows us to take a high-conviction approach and employ a high active share against our benchmarks. This allows us to de-emphasise market timing and focus on rigorous fundamental analysis of high-quality assets.

We also use low-cost solutions and direct equities and bonds, wherever possible. This open architecture approach also means that we are free to invest in world-leading assets across the investment industry. ■



A full-page background image of two skiers on a snowy mountain peak under a clear blue sky. The sun is low on the horizon, creating a bright lens flare. One skier in a red jacket is in the foreground, and another in a dark jacket is slightly behind and to the right. Both are holding ski poles and have their skis on. The mountain slope is steep and covered in snow.

cg/  
Canaccord  
Genuity  
Wealth Management

# Can-do

is unwavering support  
in challenging times

Even in the most uncertain times, we're always here for you – helping you continue on the path to achieving your goals.

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**Investment involves risk**

Build your wealth with confidence

# A “CAN-DO” MINDSET WINS FOR CANACCORD GENUITY WEALTH MANAGEMENT

**Andy Finch**, Chief Executive for **Canaccord Genuity Wealth Management**, talks to **WealthBriefing** Group Editor **Tom Burroughes** on what makes the business special.



## Please explain what you think makes your firm successful in its chosen field?

Canaccord Genuity Wealth Management has an unwavering focus on trying to do the best possible job for our clients. Can-do is our company ethos and it is embedded in everything we do. Within the firm, there is no challenge that goes unmet. As a team, ambition spearheads our culture. Everyone is hardworking, proactive, and creative, we actively embrace change and we're always pushing boundaries to achieve better results.

When I became Chief Executive of Canaccord Genuity Wealth (International) Limited I knew that I didn't want to measure success solely by the numbers we achieved, but by the feedback received from colleagues. Without them, there's no hope in reaching our financial targets, so why prioritise money over staff satisfaction?

I wanted, and continue to want, Canaccord Genuity Wealth Management to be an employer of choice, a business that people aspire to work with, a

business that demonstrates how much it cares for the people it employs. With this as our priority, the rest of what the business needs slots into place.

## What are the main contributions you think you bring to the wealth management industry?

We deliver on our brand vision of helping our clients build their wealth with confidence, and we do this by offering a wide range of products and services. When a client comes to us, whatever their needs, we can help.

Additionally, we never shy away from difficult conversations. Take the current economic climate as an example, it's an incredibly challenging environment and one where customers are turning to us for answers. This isn't the time to shrink back and stand on the side lines, it's about traversing the rocky terrain with our clients, and that's exactly what we do. We bring stability to the industry as well as transparency and authenticity.

## Where in the world do you operate – are you mainly a domestic player or international?

Canaccord Genuity Wealth Management works internationally, across the UK and Crown Dependencies (Guernsey, Isle of Man, Jersey, and the UK) as well as Australia, Canada, Dubai, Europe, Singapore, and South Africa.

## Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?

I don't think there's a particular industry I turn to for ideas and inspiration, but I am an avid reader and listener. I enjoy learning about other people's journeys and successes and then thinking about them through a different lens. How could

I tweak their ideas to fit with my circumstances, perhaps even bettering them along the way?

One book that does stick with me is *The Captain Class* by Sam Walker. It helped me recognise that to be a good leader, you don't have to be the most technically gifted individual but, you do need to be prepared to be the glue that holds everything together. Leadership is not about ego or self-indulgence; it's about allowing others to thrive while you support them.

## Can you sum up the philosophy that sums up your firm/you the best?

As an organisation, it's our “can-do” philosophy. It's about giving people the tools and skills to be fearless in the workplace and have a steadfast sense of belonging that enables them to be the best that they can be.

A philosophy that sums me up: “Leadership is not the same as management.” Leadership is an art, management is a science - while they are both complementary of each other, they are fundamentally different. The latter can be taught, the former is innate.

To be a good leader, you need to understand - and be comfortable with - the fact that you can't, and shouldn't, take problems away from people, but give them the guidance they need to figure out the solution by themselves. ■



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LOOKING TO TOMORROW.  
TAKING CARE OF TODAY.

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**FAMILY OFFICE SERVICES**

CAYMAN | JERSEY | LONDON | WYOMING, USA\*

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\*Wyoming services are provided by Crestbridge Fiduciary, LLC, a joint venture between Crestbridge and Willow Street. Crestbridge Fiduciary Limited is regulated by the Jersey Financial Services Commission for trust company business and has its principal place of business at 47, Esplanade, St. Helier, Jersey JE1 OBD, Channel Islands. None of the services referred to in this promotion are regulated services under the UK Financial Services and Markets Act 2000 (as amended).

# STRONG FUNDAMENTALS AND SHREWD INNOVATION – THE CRESTBRIDGE FORMULA

**Heather Tibbo**, Group Head of Family Office Services at **Crestbridge Family Office Services**, talks to **WealthBriefing** on what has helped the firm to stand out.



**Heather Tibbo**  
Group Head of Family Office Services,  
Crestbridge Family Office Services

## What do you think makes your firm successful in its chosen field?

We're an innovative business and that focus on innovation has certainly helped position Crestbridge as a leader in the family office services space.

For instance, it's almost three years since we launched our joint venture with US fiduciary Willow Street in the US, "Crestbridge Fiduciary", and since then we've seen a significant increase in US-booked business flows. It's interesting that in more recent times, we've seen other service providers looking at the US more closely as a growth market, but we definitely had a first mover advantage there.

That said, we don't do innovation just for innovation's sake. We believe in getting the fundamentals right - delivering

excellent client service and adopting a strong relationship-driven approach to working with clients. That approach has been critical to our success.

## What obstacles have you had to overcome?

The pandemic definitely created an operational challenge, particularly as we were launching our new joint venture in the US just as lockdown came into force. However, from a group infrastructure perspective, we were already well geared up with the technology to work remotely and support clients effectively.

Just as important though, as such a relationship-driven business, the challenge of suddenly not being able to meet face to face prompted us to pivot to new ways of interacting, both as a team and with clients. I was keen to use it as an opportunity to find new ways of communicating with clients through video and digital platforms, and I also made a concerted effort to ensure colleagues across our jurisdictional network were kept up to speed and engaged through regular digital communications. I think that was critical to overcoming that obstacle.

## What are the main contributions do you think you bring to the wealth management industry?

I'm a firm believer in the importance of supporting other people. My objective over the past ten years, for example, has been to nurture a driven, supported team, that is entirely focused on building client relationships and delivering service excellence. I absolutely believe that motivating and supporting colleagues at all levels,

helping them to achieve their potential, encouraging professional development and championing a team approach is the best way towards shared success. It's an approach that is fully aligned with the "Crestbridge culture" and I think if I can highlight the benefits of a 'people first' approach across the industry, then that's a good thing.

## What does success look like to you - can it be measured in hard numbers, or in qualitative terms, or both?

Part of our success can be evidenced through numbers - Crestbridge Family Office Services (FOS) will mark its 10-year anniversary in 2023 and over that decade we've evolved our proposition considerably, growing from a team of four in Jersey to a team of over 40 across multiple jurisdictions today. Together with co-group head Paul Hunter, we've bolstered the substance of the FOS team from a standing start, transforming it into an award-winning international business.

However, it's the impact we can make through our clients and our people that is the real success story. If we've been able to provide superior expertise to enable a client to achieve their goals, or if we've provided a platform to enable a colleague to achieve their professional ambition, then those are successes. ■



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# A HOLISTIC OFFERING GIVES EMIRATES NBD PRIVATE BANK AN EDGE

**Emirates NBD Trust Company (Jersey) Limited** talks to **WealthBriefing** Group Editor about the qualities that have shone through.

**E**mirates NBD is a leading banking group in the MENAT (Middle East, North Africa and Turkey) region with a presence in 13 countries, serving more than 17 million customers. As one of the largest financial institutions in the GCC and the flagship bank of Dubai, we offer clients a full-fledged and diversified offering across retail banking, wealth management, wholesale banking and trade finance, Islamic as well as investment banking.

Private banking, a pivotal unit of the bank's wealth management division serving high net worth and ultra-HNW individuals, families and select institutions, has grown to be one of the most trusted and reputable names in the Middle East.

We have dedicated private banking offices in the United Arab Emirates (headquarters in Dubai with a branch in Abu Dhabi), the Kingdom of Saudi Arabia (Riyadh, Khobar and Jeddah), the UK (London) Singapore and India. Our global presence and off-shore booking centres ensure we deliver relevant local expertise and opportunities to our international clients.

A holistic offering gives our advisory services an edge - whereby we place our clients at the heart of decision-making, understand their true investment objectives and offer best in class investment strategies while using an open architecture product/fund offering to bring them to life. We follow a systematic advisory process that involves a thorough understanding of their needs, a portfolio constructed with carefully selected products, periodic reporting, and regular rebalancing. Our clients' needs are supported by a dedicated team comprising culturally diverse and experienced local, regional, and global specialists, based on the markets we operate in and our diverse client base.

Moreover, one of our key services, keeping in mind our discerning audience, is trust and estate planning. The Emirates NBD Trust Company, which is in Jersey in the Channel Islands, was established



more than 21 years ago, showing that we have a well-established track record in serving our clients and we understand that providing services for trusts, companies and other structures is a long-term commitment that could last for decades.

Our trust offering is further enhanced by the provision of our dedicated team in Dubai to elevate our service levels and become a trusted fiduciary partner of choice for both our corporate and private banking clients. We offer a range of offshore services tailored to our clients' needs, to facilitate the effective management of family wealth and inter-generational wealth transfer. Our structuring services include succession planning, trust services, and liquidity planning to ensure that the next generation is fully equipped to manage their personal wealth coupled with a trusted relationship allowing us to stay by their side throughout the process of managing and transferring wealth.

We believe that it is imperative to choose a trustee that is experienced, well-regulated and perfectly understands both your and your family's needs. In closing, we have continued to be a leader in digitisation and innovation in the region.

Through our relationship managers we are encouraging our traditional clients to make the shift to our digital banking channels viz. our mobile banking App, online banking and tablet banking platforms for everyday transactions such as making transfers, remitting funds or paying bills, as well as accessing their investment portfolios, performing trades online conveniently and even applying for IPO subscriptions for major local and regional company offerings.

In line with Emirates NBD Group's long-term commitment to the sustainability agenda, Emirates NBD Private Banking has taken active strides towards expanding its environmental, social and governance charter. ■





HIGHVERN

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# KEEPING SERVICES SIMPLE AS POSSIBLE AND REACHING A HIGH STANDARD

**Ken Ritche, Aidan O'Flanagan and James Bryant** of the Funds Team at **HIGHVERN**, talk to **Tom Burroughes**, *WealthBriefing* Group Editor.



**Ken Ritche, Aidan O'Flanagan and James Bryant**  
Funds Team, HIGHVERN

HIGHVERN and the continued promotion of our brand across and new our offices in the Cayman Islands, Ireland, Cayman Islands, Guernsey and Switzerland, whilst continuing to offer the same award-winning services that we have become known for in Jersey.

**What does success look like you - can this be measured in hard numbers, or in qualitative ways, or both?**

Success to HIGHVERN is demonstrated through the willingness, cohesion, and ease with which we all work together. Acting as 'one group' with a common goal allows us to support the delivery of strong brand values and a clear vision of the business' objectives. Growth, recognition, and individual success all flow from this, but we believe getting the foundations right for our clients is the most important element to sustainable growth. This year we have more than doubled the size of our business to now employing around 130 people in our different jurisdictions. A significant investment in technology will take HIGHVERN to the next level as we continue to leverage our greatest asset – our people.

**What position would you like your firm to hold in its sector in five years' time?**

Whilst we obviously wish to continue growing, our ambitions are not defined by size or scale but rather by reputation. Our goal is to continue to improve what we deliver, setting new standards, and by doing that continually both us and our clients will succeed. ■



**Please explain what you think makes your firm successful in its chosen field?**

HIGHVERN has a very simple goal, consistent across our core propositions of corporate and fund administration as well as private client services; that is to deliver superior value through setting high standards in all that we do. We make matters as uncomplicated as possible, at the same time ensuring our offering is tailored specifically to the client and delivered with transparency and accountability.

This approach has not only seen us earn a strong reputation for our excellent client service levels but allowed us to become one of the leading independent services providers, now with a multi-jurisdictional offering. Because these values resonate with so many individuals, we have also been able to employ and retain amongst the best talent in the market who are focused on continuing to take HIGHVERN to new ambitious levels. Considered and measured growth has allowed us to expand and evolve with the changing times, always without compromising on the standards and values for which we have become renowned.

**What have been the main obstacles you had to overcome and how did you do so to reach this level?**

The challenges in delivering on your promises are the same amongst all competitors in our sector. The difference lies in how each firm seeks to meet them and at HIGHVERN this is achieved through a tight focus on what our clients need and supporting our colleagues in delivering them in the best way possible. A fully engaged team will always deliver the best outcomes for clients.

**Where in the world do you operate – are you mainly a domestic player or international?**

At the start of 2022, we were a highly respected offshore business operating from Jersey with an office in the UK. Now we have a presence in six jurisdictions, expanding the services and breadth of expertise we can offer our clients. We firmly believe we now offer one of the most competitive independent services across corporate, fund administration and private client services. We will be focused on building an awareness of



# Extraordinary times.

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Even in these extraordinary times, you can still spot possibilities. Of course, it helps working with people who offer a different take on how to turn them into realities. Let's talk.

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# EXCEPTIONAL SERVICE DELIVERY OVER TIME AT INVESTEC'S CHANNEL ISLANDS BUSINESS

**Brendan Stewart, CEO, Investec Bank (Channel Islands) Limited**, talks to *WealthBriefing* about how this firm has impressed with its performance.



**Brendan Stewart**  
CEO, Investec Bank  
(Channel Islands) Limited

**Please explain what you think makes your firm successful in its chosen field.**

I think our success ultimately comes down to our track record of delivering exceptional service which comes from the refreshingly human approach of our people, who share a belief that we will find a way to succeed, even in difficult times.

We can do nothing without our people. I'm proud to say we are an employer of choice in the Channel Islands, meaning that our people want to work here, enjoy working here and tend to stay for a long time. We are a high touch business, and our service model rests upon this, making our people incredibly important.

Our people are also experts. We match our clients with specialists, so if they are a resident of Jersey or Guernsey, or if they are a UK resident non-UK domicile or a family office, they will be paired with a banker who understands their needs. Our offering is simple: meet the needs of our clients and match our offering to their objectives. We don't have off-the-shelf products, what we do is tailored to the individual client. For 2021 we were the leading private bank lender in the Channel Islands, both by volume and by value because we offer a true private banking

experience. And we are on course for the third year running, to be the number one Private Bank lender in Guernsey in both value and number.\*

**Where in the world do you operate - are you mainly a domestic player or international?**

Offshore, we operate in Guernsey, Jersey, and the Isle of Man, and with the broader Investec group we have our core markets of the UK and South Africa, with additional presence in - amongst others - Switzerland, the USA, Ireland and Mauritius. Investec Bank Plc also houses the Wealth & Investment business, with £40.5 billion funds under management as at 30 September 2022. We bring all of that weight to the Channel Islands, improving our credit, product and asset offering.

This enables us to have global reach but maintain our local understanding and high-quality service. The bank has been in the Channel Islands for more than 40 years, and has 135 people working in the Islands and Isle of Man. Our client service and operations teams are based in Guernsey, not outsourced. Any queries can be resolved simply by taking a few steps across the floor.

We continue to expand and see growth opportunities right here in the Channel Islands. In Jersey, we have recently signed a lease on a new office, bigger and better than our previous space, which demonstrates our commitment to our business here. Our lending team is one of the biggest in the Islands.

**What does success look like you - can this be measured in hard numbers, or in qualitative ways, or both?**

We exist to help clients achieve their financial goals for themselves and their families. We help them to create and sustain financial futures. This is our qualitative measure of success. From a quantitative perspective, our goal is to provide banking services and loans and to look after clients' money.

At Investec, we have growth in our DNA. What began as an entrepreneurial business in 1974 is now a truly international organisation. In the Channel Islands, we will continue to grow each of our service lines, and in each of our geographies. That is an exciting measure of success!

**Can you sum up the philosophy that sums up your firm/you the best?**

Our purpose is to create enduring worth - living in, not off, society. We seek to help our clients to create enduring worth. This philosophy is that life is not just about money but about what that money can do in terms of helping our clients to achieve their aspirations and create their legacy. This approach has defined us ever since our founding and it's a philosophy that extends to every facet of our business.

We're committed to adding value to the communities in which we operate. We partner with different causes, including Macmillan Cancer Support Jersey, the Durrell Wildlife Conservation Trust, Guernsey Mind, and a significant new arts sponsorship to be announced shortly.

We have a community donations committee in both islands made up of staff volunteers with a budget to support wider local causes. Our local CSR activities means we also give our time, encouraging our people to take paid time out to support local charities including La Societe Guernesiaise and Jersey Mencap.

It is incredibly important to us that we have a positive impact on our communities, both through our service offering and our charitable giving. ■

\* Excluding Share Transfer transactions, completed in both Guernsey and Jersey in 2021 and 2022. Compiled using data from Unusualities of Guernsey and Jersey Registration Documents issued by the Royal Court of Jersey.





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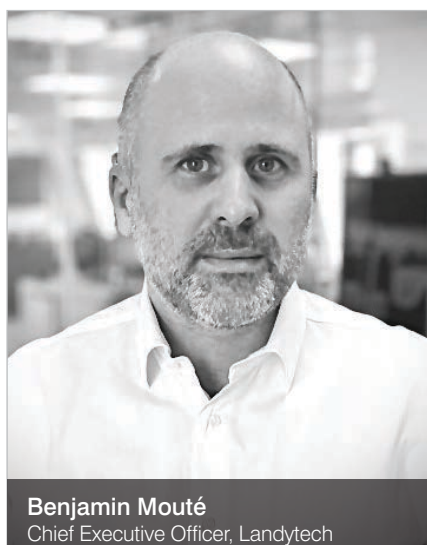


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# CONTINUOUS INNOVATION KEEPS LANDYTECH OUT FRONT

**Benjamin Mouté**, Chief Executive Officer, **Landytech**, explains the firm's achievements to **WealthBriefing** Group Editor **Tom Burroughes**.



**Benjamin Mouté**  
Chief Executive Officer, Landytech

**L**andytech is the company behind Sesame, the investment reporting platform that provides asset managers, family offices and trustees with consolidated data, robust portfolio analytics and automated investment reporting, to help streamline processes and inform investment decision making.

Receiving the award for best client reporting solution is a great milestone that affirms Landytech's commitment to revolutionising the way that asset owners, investment managers and advisors access asset information.

**Please explain what you think makes your firm successful in its chosen field.**

Landytech's success has been fuelled by continuous innovation and growth, ensuring we keep pace with evolving needs across the spectrum of private wealth managers, from trustees to single and multi-family offices. That means building solutions that cover the entire data management, portfolio monitoring and reporting process, enabling private wealth managers to build strong relationships

with their clients, attract and retain talent, and reduce their overheads. Our open architecture and customisable platform enable us to create client-centric solutions that can cater for even the most complex asset allocations, in a way that other vendors are unable to match.

**What have been the main obstacles you had to overcome and how did you do so to reach this level?**

The main challenge has been to convince clients that although they may get by for now with the status quo of data management in unwieldy spreadsheets and static periodic reports, the shift to digital solutions is accelerating, so to cater to the next generation of wealth owners and futureproof their business, they need to be transitioning now. However, choosing the right technology, backed by robust data management and reporting capabilities, requires the buy-in of many stakeholders. Often, it is only when they see the platform with their own eyes that they really become aware of the possibilities today's solutions can bring to improve productivity and drive growth.

**Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?**

At Landytech our clients are our greatest source of inspiration, ensuring that we stay at the forefront of the industry. We also keep an eye on trends from the wider technology industry for areas that we can take influence, to help us improve our own client experience and continually deliver new features and services that bring constant improvement to our client's operations and business development initiatives. We are building a community of like-minded asset owners, managers, and advisors around the Landytech brand, all of whom share ideas and best practice so that we can drive the industry forward together.

**What position would you like your firm to hold in its sector in five years' time?**

In five years', we see ourselves being one of the WealthTech leaders in the private wealth industry. Since inception we have continuously grown revenues by over 100 per cent per annum, and with a strong finish to 2022 this is only set to continue. With a platform built on open architecture principles our aim is to work with data, software and services partners to deliver tailored solution that cater for a vast range of use cases for private wealth managers and their unique needs. We see the current moment as a turning point for the private wealth industry, firms must evolve to survive and ultimately thrive. We expect Landytech to be at the vanguard of that shift.

**How do awards such as this make a difference to your firm and your colleagues?**

Receiving an award for our client reporting solution is a great affirmation of the outstanding quality of Landytech's platform for private wealth managers. It provides an important level of credibility in the Channel Islands, but also in other private wealth management hubs around the world. The award also provides an assurance to prospective customers in the region who are looking for the best solution to digitalise their data management and reporting capabilities. The Channel Islands is a strategic growth market for Landytech, in which we are building quite some momentum, and this award is an important milestone in our mission to help digitalise the private wealth industry. ■





WealthBriefing CHANNEL ISLANDS  
**AWARDS 2022**  
LIFETIME ACHIEVEMENT

— WINNER —  
Mark Chasey,  
Oak Group

# Congratulations Mark Chasey.

We are delighted to share that Mark Chasey, who founded Oak in 1999, has been awarded the **WealthBriefing lifetime achievement award**.

Mark's personality and people-first approach forms the DNA of Oak's culture, putting people at the centre of everything we do. The growth and success of the business across the past three decades have been built on his passion and ability to provide exceptional service to private clients around the world.

Congratulations Mark, once again.

Learn more  
about Mark:



GUERNSEY  
ISLE OF MAN  
JERSEY

LUXEMBOURG  
MAURITIUS

**OAK**

# A LIFETIME OF ACHIEVEMENT – MARK CHASEY OF OAK GROUP

**Oak Group** tells *WealthBriefing* Group Editor **Tom Burroughes** about **Mark Chasey** and his remarkable career.

**O**ak is proud to announce Mark has been awarded the *WealthBriefing* lifetime achievement award, 2022. Headquartered in Guernsey, Oak Group is a private client, corporate services, and fund administration business with offices in Guernsey, Isle of Man, Jersey, Mauritius, and Luxembourg.

Mark founded Oak in 1999, with the aim to create a business with a family ethos, building and mentoring his team to provide high quality client service. Mark's people-first approach forms the DNA of Oak's culture, putting people at the centre of everything we do.

The growth and success of the business have been built on his passion and ability not only to provide exceptional service to private clients around the world, but also in his ability to engage with and encourage others.

Our people provide the strength and depth of expertise needed to deliver prompt and considered services to our clients, and our purpose of People – Planet – Value is at the core of everything we do, be it our relationships with our stakeholders, to how we undertake the management of wealth. It inspires our approach and influences our clients for a better, braver, and more transparent service.

Mark worked incredibly hard to become the first member of his family to go to university. He subsequently qualified as a Chartered Accountant. After establishing a liquidation company in Johannesburg in 1989, he moved to the Channel Islands in 1997 and founded Oak in 1999 with a loan of £10,000 (\$11,980) from a family member.

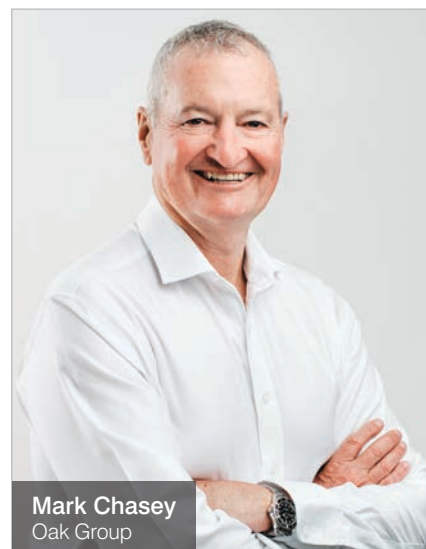
Mark says "The Private Wealth industry is an exciting industry and I enjoy the people it involves. I surround myself with the best people, and I am honoured to work with Oak's dedicated employees, some of whom have worked with me for ten or twenty years."

Mark has created personal relationships with many clients from around the world which has meant some degree of sacrifice on Mark's part in terms of the time he was able to spend with his young family but was key to the success that Oak has become today.

Mark is heavily involved in various charities and groups outside of Oak, including Male Uprising Guernsey (MUG), the establishment of I61 in Mauritius, the Guernsey Protea Society (GPS) and he is serving his second term as EMEA representative of the South African Institute of Chartered Accountants (SAICA). As a result of Oak's success, he is pleased to be able to contribute and give back to society in a meaningful way.

Mark is proud to have won the *WealthBriefing* Lifetime Achievement Award and is grateful to be recognised for the hard work he has devoted to Oak, his clients and the wider population linked to his charitable endeavours. He can reflect on previous decades and be proud of where Oak is today with the wonderful staff, opportunity for the future and a business he is happy to be part of.

Mark added: "If you work hard, set your mind to getting things done anything is achievable. I hope this award will inspire others and encourage creativity and entrepreneurship." ■



**Mark Chasey**  
Oak Group

**"IF YOU WORK HARD, SET YOUR MIND TO GETTING THINGS DONE ANYTHING IS ACHIEVABLE. I HOPE THIS AWARD WILL INSPIRE OTHERS AND ENCOURAGE CREATIVITY AND ENTREPRENEURSHIP."**



# A WEALTH MANAGER TO GUIDE YOU THROUGH ALL SEASONS

ODEY  
WEALTH

We are proud to have been recognised as the Best Fund Manager at the Wealth Briefing Channel Islands Awards.

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or email [info@odeywealth.com](mailto:info@odeywealth.com).



# A KEEN UNDERSTANDING OF RISK AND CAPITAL PRESERVATION AT ODEY

**Geoff Marson**, a Portfolio Manager at **Odey Wealth Management**, talks to **WealthBriefing** Group Editor **Tom Burroughes**.



**Geoff Marson**  
Portfolio Manager,  
Odey Wealth Management

**O**dey Wealth Management (CI) Limited was launched in January of 2008 with Shaun Le Messurier and I, as founding Guernsey-based directors to provide discretionary investment services to high-net-worth private clients, intermediaries, and institutions. OWM is almost unique in the investment management world - a discretionary investment manager housed within a hedge fund asset management business. OWM UK was launched in 2010 to offer an on-shore solution to private clients, both OWM CI and UK work closely together and are under the direction of our new CEO Peter Martin.

OWM manages discretionary assets on behalf of institutional investors, such as the States of Guernsey, charities, private family offices and individual investors, totalling more than £1 billion (\$1.21 billion). We have become recognised by many as one of the best performing wealth managers in the international finance centres.

The Odey Opportunity Strategy is composed of the Odey Opportunity Fund and associated discretionary segregated

mandates, seeking to achieve an equal emphasis between capital growth and preservation of capital through our active and dynamic unconstrained approach.

## Tell me about the investment process behind your award-winning performance?

This philosophy has not changed materially since the inception of OWM in January 2008. We have always advocated the importance of deciding when to take risk and when to preserve capital.

Odey has an exceptional record using original research to build and protect capital for clients. Our central belief is that good investment management requires creativity, conviction, accountability and transparency. We put performance first, are independently minded and back our ideas with conviction.

Our investment process is a combination of medium- and long-term signals (fundamentals and valuations) with short term tactical insights (sentiment and technical) to identify turning points.

## What differentiates you from your peers?

I am a discretionary manager within a hedge fund investment house. As a result, and whilst I am benchmark aware, at times I need to be able to be bold and prepared to radically move away from the benchmark, especially in down markets. Examples would be our preparedness to go to cash in difficult markets or moving into out-of-favour sectors such as energy and materials and depart from the consensus positioning.

All this within the context of dealing in traditional markets - no illiquid alternatives - circa 95 per cent of my investments can be liquidated within a day - very few, if any, similar strategies within

my peer group has this type of liquidity. I have always been sceptical of investment approaches where returns often appear to be too good to be true.

I choose to own direct holdings because I want to understand what I own. This stands us apart from the typical fund of fund approach favoured by our competitors, but also the cost and fees of the investment strategy are lower.

My strategy comes down to having a diversified approach that is not dependant on one outcome for success or failure. This makes our strategy an ideal single portfolio solution, but especially as a part of a blended solution with other managers. I have delivered impressive absolute and risk-adjusted returns over nearly 15 years.

## What are your thoughts for investors moving forward?

Investors need to understand that the landscape has shifted since the pandemic. The days of easy monetary policy are almost certainly over. Inflation has become an increasingly bigger factor in investment decisions.

There is a tug of war between the US and China for the position of global hegemon. This will make investing more challenging than the previous 10 years and you will need to be able to think for yourself. ■





# WE'RE INVESTING FOR THE NEXT 250 YEARS

For over 250 years, generations of clients have trusted us to build and preserve their wealth.

At Quilter Cheviot, we have a duty to make sure that we are considering environmental, social and governance issues throughout our investment process and through our engagement with the companies and funds we invest in on behalf of our clients.

We believe that being a responsible investor is an important element in working towards a sustainable future for the next generation. As a business that tailors its services to the specific needs of our clients, we strive to meet their responsible investment objectives.

**Find out more about investing with us by contacting Tim Childe, Head of International & Jersey Office on +44 (0)1534 506070 or visit [www.quiltercheviot.com](http://www.quiltercheviot.com)**



**QUILTER CHEVIOT**  
INVESTMENT MANAGEMENT

INVESTING FOR GENERATIONS

**Investors should remember that the value of investments, and the income from them, can go down as well as up and that past performance is no guarantee of future returns. You may not recover what you invest.**

Quilter Cheviot and Quilter Cheviot Investment Management are trading names of Quilter Cheviot Limited. Quilter Cheviot Limited is registered in England with number 01923571, registered office at Senator House, 85 Queen Victoria Street, London, EC4V 4AB. Quilter Cheviot Limited is a member of the London Stock Exchange and authorised and regulated by the UK Financial Conduct Authority and by the Jersey Financial Services Commission in Jersey. Accordingly, in some respects the regulatory system that applies will be different from that of the United Kingdom.

# A BESPOKE SERVICE OFFERING FROM QUILTER CHEVIOT

**Tim Childe**, Head of International and Jersey Office for **Quilter Cheviot Investment Management**, talks to **WealthBriefing** Group Editor **Tom Burroughes** on the firm's recent achievements.



**Tim Childe**  
Head of International and  
Jersey Office, Quilter Cheviot

**Please explain what you think makes your firm successful in its chosen field.**

At Quilter Cheviot, we have built our reputation as a wealth management company over 250 years. Our standards and values have remained consistent throughout, and our ability to continually evolve and adapt has kept us at the forefront of wealth management since 1771. We manage £24.9 billion (\$29.8 billion) assets (as of 30 September 2022) for over 36,000 clients.

Our bespoke service offering, including Sharia Compliant portfolios and ethical and values-oriented investing, enables us to provide our private clients, trustees, charities and professional advisors with investments to match their specific needs. Also, a direct relationship with a dedicated investment manager ensures a continued level of individual attention which defines the standard level of personal service we provide to every one of our clients.

Having trust and continuity, with the average tenure of staff at Quilter Cheviot being 16 years, means that our clients can experience a relationship with us throughout the lifetime of their investment and through generations of families.

Quilter Cheviot is committed to developing internal talent and providing mentoring for staff.

Our London-based research teams also play a key role in the firm's success. We have one of the largest in-house research teams in the discretionary industry, focusing on equity, fixed interest and collective (fund) analysis. The team also have direct access to senior management of listed companies and the managers of funds we invest in, giving us unique insights and investment opportunities. To demonstrate the depth and breadth of our research, the team clock up more than 37,000 research hours per year. This resource is also pivotal in our approach to integrating environmental, social and governance factors into our decision making.

**What are the main contributions do you think you bring to the wealth management industry?**

I have great empathy with my clients, some of whom I have looked after their investments for many years. In fact, many of my clients are friends and I know their children and grandchildren.

I listen to my clients and their needs and ensure that client expectations are met. I never make assumptions and I am always honest and open.

**Where in the world do you operate - are you mainly a domestic player or international?**

While we have had an office in Jersey for a long time now - it is in fact our 50th anniversary this year - I would say that we are more of an international player. We have many longstanding and valued clients in Jersey but, as is commonly the nature with financial services on the island, there is also a big focus on international clients.

We have a regulated office in the DIFC, which has been open for seven years this year, that allows us to better service clients in the region. We have also been a Category I license holder in

South Africa since 2007 which allows us to provide intermediation on a cross-border basis. We also recently registered a number of our Jersey-based Investment Managers in Switzerland, which again allows us to provide services to Swiss resident clients on a cross-border basis.

A big part of our business is maintaining and building strong client relationships and it has been very pleasing that the easing of pandemic restrictions has allowed us to travel freely once more to meet with clients. Lockdowns and travel restrictions did reveal that technological advances have broken down significant communication barriers with the proliferation of video calls, but I believe there is still great value to be had in face-to-face meetings.

**What does success look like you - can this be measured in hard numbers, or in qualitative ways, or both?**

For me, success is doing the best job we can for clients. Over the years we have had lots of positive feedback in this regard, with clients regularly telling us that we are a safe pair of hands. Our longstanding relationship with many clients is also testament to our service and supports our excellent reputation.

In terms of quantitative metrics for client satisfaction, there is no better endorsement than client referrals. I believe clients want consistency and trusted relationships and when they choose to refer family and friends to us, that speaks volumes as to how they view our services. ■

*Note: Investors should remember that the value of investments, and the income from them, can go down as well as up. Investors may not recover what they invest. Past performance is no guarantee of future results.*

Royal Bank of Canada

# A legacy that inspires the next generation.



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RBC 1853

# DEEP AND BROAD TRUST EXPERTISE SHINES AT RBC WEALTH MANAGEMENT

**Gail McCourt**, Head of Private Client Fiduciary Services for **RBC Wealth Management**, sets out the firm's attributes to **Tom Burroughes**, *WealthBriefing* Group Editor.

**Please explain what you think makes your firm successful in its chosen field.**

RBC Wealth Management's trust business in the Channel Islands delivers an exceptional client experience. Our clients value that we are a leading global financial service provider, with a prudent approach to risk management and a strong balance sheet.

As an exclusively private client focused business, our trust expertise lies in complex, multijurisdictional, dynastic planning for our ultra-high net worth clients; delivered by proactive and industry-recognised fiduciaries. We are proud of the depth of expertise within our team; our 46 fiduciary decision-makers have an average 21-year tenure at RBC.

Our large pipeline of intermediary-referred new business opportunities reflects our standing in the marketplace as the organisation with the experience and expertise to handle complex fiduciary structures.

**Where in the world do you operate - are you mainly a domestic player or international?**

Through our trust business in the Channel Islands, we partner with RBC teams across the UK, North America, and Asia to serve our largest and most complex clients and enterprising families.

Our Channel Islands fiduciary teams have decades of skill and experience in delivering family office services which include, but are not limited to, administration, accounting, reporting, investment monitoring, property management, and concierge-type services.

We also have several UHNW family office clients where we are either an

extension of a client's own family office or a complete outsourced resource for a family.

We offer complementary solutions to our Canada and US-based clients, affording them access to sophisticated fiduciary capability to deliver additional and considerable value to RBC's global client base.

We also partner with our City National colleagues to service clients from both a US domestic and an international perspective. The model supports a comprehensive domestic trust team, with a Channel Islands-based client facing team with overall responsibility for service delivery and for the legal, regulatory and tax compliance of each structure.

**Can you sum up the philosophy that sums up your firm/you the best?**

Fundamentally, our people are the key to our growth. Our strategy is focused on continuing to grow our private client business in the UK and Channel Islands, and to achieve that we prioritise developing our people. We're delighted that we have just had our re-accreditation as a STEP Platinum Employer Partner

With that in mind, we recently realigned the structure of our trust business to ensure our talent is set up to drive both business and personal success. This realignment saw ten new roles created, including five at director-level.

Several the new roles were within our well-established Technical Trust team - an in-house service that grants our trustees access to legal, tax, governance and fiduciary-focused professionals, which is a key differentiator in our structure.

Another way in which we bring to life RBC's purpose of helping clients thrive and communities prosper is through



**Gail McCourt**  
Head of Private Client Fiduciary  
Services, RBC Wealth Management

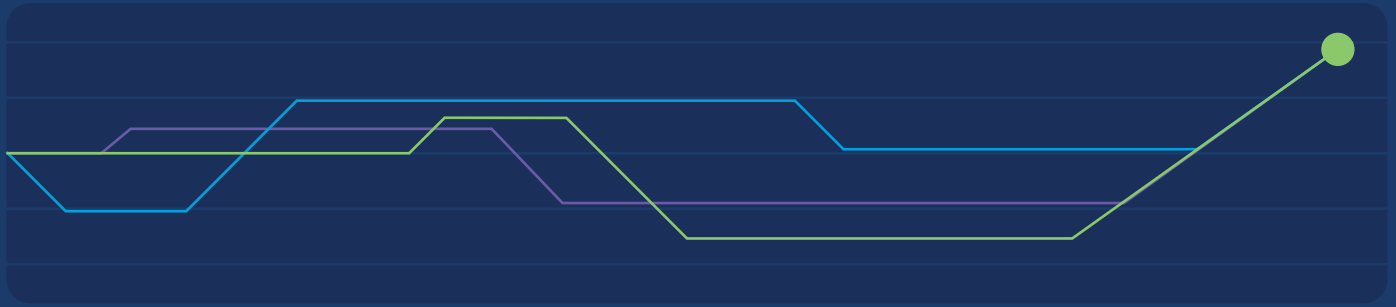
our commitment to diversity and inclusion. We have an established Employee Resource Groups with focuses such as LGBTQ+, women in work and dependent care. We were also one of the first financial services firms to voluntarily publish a gender pay report in the Channel Islands. This clearly shows commitment to supporting the advancement of women into leadership positions.

**How do awards such as this make a difference to your firm and your colleagues?**

Recognition in industry awards such as The *WealthBriefing* Channel Islands Awards is an amazing endorsement of our work. It is fantastic to see the high regard in which we are held by the industry, professional advisors and clients. ■



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**Winner – Advent Genesis:** Best Portfolio Management Solution

WealthBriefing Channel Islands Awards 2022



# CONNECTING CLIENTS TO WORLD-CLASS ORGANISATIONS

**Paul Bebber**, Senior Director – Sales UK, Central Europe & South Africa, at **SS&C Advent**, talks to **WealthBriefing** Group Editor **Tom Burroughes** on his firm's accomplishments.



**Paul Bebber**  
Senior Director – Sales UK, Central  
Europe & South Africa, SS&C Advent

## What are the main contributions do you think you bring to the wealth management industry?

Our solutions and services enable our clients to build world class organisations. We also pride ourselves on having a highly skilled team that can assist and advise as needed. It is also important to us to have strong representation in all our regions. Understanding the local nuances is key to being successful.

We continue to invest and innovate, to continually improve our clients' options and empower them to be successful. Our aim is to optimise our clients' potential and allow them to create thriving businesses. Only by focusing on the client and market needs can we match our own ambitions and standards.

## What does success look like to you – can this be measured in hard numbers, or in qualitative ways, or both?

To us, true success is in assisting in our client's success. Focusing on having strong, flourishing, and happy clients will ensure the other metrics are met. As a long standing and market leading vendor we do have the requisite oversight on financial, and quality metrics, as these are core elements of a healthy business.

## How do awards such as this make a difference to your firm and your colleagues?

Recognition from well-established and respected publications are validation of our approach and commitment to the market. It is invaluable to all our key stakeholders, both internal and external, to see our solutions and services acknowledged by highly regarded independent observers.

Winning awards in the region reinforces our capabilities and demonstrates our commitment to continued success for our customers.

## Please explain what you think makes your firm successful in its chosen field

SS&C continues to innovate with integrated solutions covering the entire investment lifecycle, enabling wealth managers to maintain higher client-advisor ratios, attract and retain the best talent, and boost their profitability. Our breadth of business lines, and our global scale

aligned with our local presence in all of our key markets, allows us to bring multiple benefits to our clients, unmatched by other vendors.

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

We continue to grow our client base in all regions.

## What position would you like your firm to hold in its sector in five years' time?

Our aim is to continue to grow and to be one of the leading vendors in the market. We strive to be seen as a respected and valued member of our clients' communities and to bring expertise, ideas, innovation and world class solutions to serve the market.

We also aim to be an employer of choice wherever we have a presence. ■



“TO US, **TRUE** SUCCESS IS IN **ASSISTING** IN OUR CLIENT'S SUCCESS. **FOCUSING** ON HAVING **STRONG, FLOURISHING, AND HAPPY** CLIENTS WILL **ENSURE** THE OTHER METRICS ARE MET.”



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The initiative aims to build the capacity of young people to access jobs and economic opportunities that will help close the inequality gap.

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# A CONSISTENT COMMITMENT TO SUSTAINABILITY

Henry Baye, CEO Jersey, **Standard Chartered**, talks to **WealthBriefing** about his firm's ability to stand apart.

## Please explain what you think makes your firm successful in its chosen field

Firstly, it is our people who make us successful and their ability to build close relationships with clients, getting to the core of their financial needs and personal circumstances. Secondly, our ESG offering is a specialism, which is in response to listening to what our clients want. ESG considerations have become an increasingly important part of the investment process.

Our approach to sustainable investment offering is high-quality conversations and curation of sustainable investing solutions, mitigating ESG and impact-washing. Additionally, offering clients access to sustainable investing through our suite of open-source solutions, and finally, providing perspectives on issues and opportunities in the broader space of sustainability and innovation.

## How do awards such as this make a difference to your firm and your colleagues?

Winning the Best Private Bank for ESG Impact Investing award is a testament to the hard work and commitment of the team to serve our clients. Every day, they go above and beyond to support clients protect and grow their wealth. It's a popular category with strong contenders and we're very proud of the recognition.

## Where in the world do you operate - are you mainly a domestic player or international?

Standard Chartered is an international trusted brand, and a wealth management partner of choice for high net worth and ultra-HNW clients across Europe, Asia, Africa and the Middle East. The Bank has a 160-year heritage of excellence and expertise, with a presence in 59 of the world's most dynamic markets. Our purpose is to drive commerce and prosperity through our unique diversity, and our heritage and values are

expressed in our brand promise, here for good. In Jersey, Standard Chartered offers Priority Banking services to customers with over \$100,000 to invest. Our Private Bank clients are also booked in Jersey, but serviced from London, UK. Standard Chartered is one of Jersey's most well-established institutions, with a presence spanning over 40 years.

## What does success look like to you – can this be measured in hard numbers, or in qualitative ways, or both?

Our success is measured by the fulfilment of our purpose. We seek to be not just a financial institution but a real force for good at the forefront of innovations, aiming for net zero both from our own operations and our financed operations, and helping our clients and local communities prosper.

For example, we have Futuremakers, our global initiative to tackle inequality by promoting greater economic inclusion in our markets. Futuremakers supports disadvantaged young people, especially girls and people with visual impairments, to learn new skills and improve their chances of getting a job or starting their own business.

## Can you sum up the philosophy that sums up your firm/you the best?

Our bank is a purpose driven organisation. Everything starts and ends with our purpose, and we are passionate about it. Our very DNA is born out of a unique diversity - in both senses of the Bank's history and diversity and talent of the workforce.

We are clear about what we stand for, for example our three pillars; accelerating zero, uplifting participation and re-setting globalisation. These stands are the drive that keep us restless to make impact in our world and the one our children live in. ■



**Henry Baye**  
CEO Jersey, Standard Chartered

"OUR BANK IS A **PURPOSE** DRIVEN ORGANISATION. EVERYTHING **STARTS** AND **ENDS** WITH OUR **PURPOSE**, AND WE ARE **PASSIONATE** ABOUT IT."



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# FIRMS CAN REIMAGINE THEIR DIGITAL JOURNEY WITH TRUSTQUAY

**Keith Hale**, Executive Chairman of **TrustQuay**, tells **WealthBriefing** Group Editor **Tom Burroughes** on how this firm has hit the heights.

## Please explain what you think makes your firm successful in its chosen field

TrustQuay is a global leader in technology for the corporate services, trust and alternative fund administration industry, offering a functionally rich, scalable and secure front to back-office platform.

We help corporate services, trust and alternative fund administrators to reimagine their processes no matter where they are on their digitalisation pathway. We work with providers to help them consolidate data and systems onto a single digital platform, reduce regulatory burden, increase efficiencies, and reduce costs through automation, and differentiate themselves in the market offering digital engagement with their customers.

Serving more than 360 customers with 26,000 users in over 30 jurisdictions, TrustQuay has 11 offices around the world, including Jersey, Guernsey, UK, Luxembourg, Singapore, and Australia.

## What are the main contributions do you think you bring to the wealth management industry?

TrustQuay's proposition is to enable digitalisation of the trust administration, corporate and fund services market (as part of the wider wealth management industry) via modern, scalable, and secure technology. We feel we have made good progress particularly over the last three years, with more than 50 new customers implementing our software, but recognise that there is plenty more for the industry and us to do. For example, in April this year we launched TrustQuay Online, a game-changing new software offering.

TrustQuay Online is a fully digital entity management, client accounting, general ledger and practice management SaaS platform, enabling providers to meet their

corporate and private wealth clients' regulatory requirements as well as manage their own business in a simple to use, highly automated way at a significantly reduced total cost of ownership. In October, we incorporated a new fund administration product as part of TrustQuay Online, offering fund service providers a frictionless end-to-end solution from onboarding to lifecycle management.

## What does success look like for you – can this be measured in hard numbers, or in qualitative ways, or both?

We measure our success both qualitatively and quantitatively. TrustQuay's vision is to become the technology provider of choice, both globally and in every market in which we operate. Our mission is to help our customers to leverage the power of technology to maximise efficiencies, reduce costs, ensure compliance, and drive new revenue opportunities.

In 2021 (our most recent reporting period) recurring revenue sales were 160 per cent higher than the prior year including 18 new logo signings. In 2021, TrustQuay successfully delivered 38 project go-lives, including 10 new implementations, 13 new modules, three new sites, five migrations and seven upgrades.

## Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?

We get a lot of ideas and inspiration from other sectors of financial services and adapt these to the needs of corporate, trust and fund services providers. Onboarding is a good example – we live in an age where challenger banks are now able to prove identity, check addresses and meet KYC and AML requirements in minutes, however this was not happening or possible in our sector.

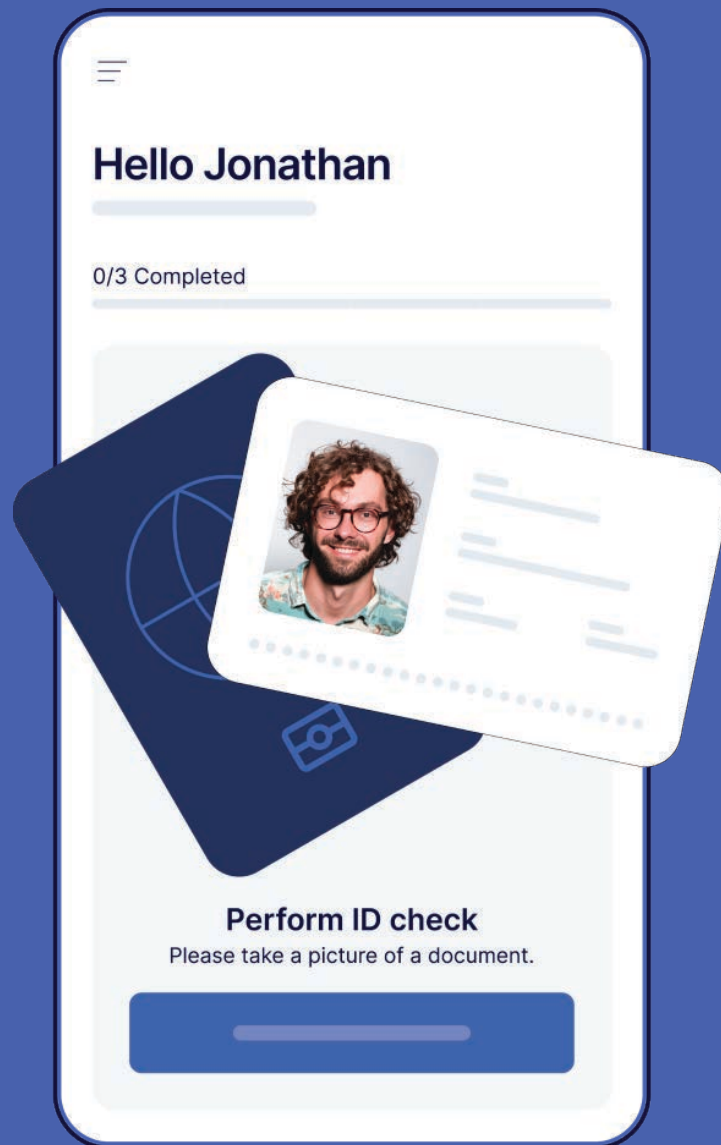


**Keith Hale**  
Executive Chairman, TrustQuay

Working with best of breed ecosystem partners such as RiskScreen and GB Group, TrustQuay developed and launched the first fully automated and integrated onboarding solution specifically designed and developed for the corporate services and trust administration market, which also includes built-in ID verification. This new solution provides a full audit trail that meets all KYC and AML obligations. ■



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**[tillertech.com](https://tillertech.com)**

# TAKING WEALTHTECH INTO THE MODERN WORLD AT TILLER

**Jonathan Wauton**, Chief Operating Officer and Co-Founder at **Verify by Tiller**, based in Jersey, talks to **Tom Burroughes**, Group Editor of *WealthBriefing*.

**W**auton founded the technology firm 2014, which was previously called Sequential Ermitage.

Tiller builds software for wealth firms, such as around customer-facing technology.

"We continue to offer digital [services] for firms that want to offer a tiered service model," Wauton told *WealthBriefing* in an interview. "This [tiered model] is the only way of attracting the next band of smaller clients."

Tiller operates a "modular" structure, with a range of services such as for on-boarding, portfolio management and rebalancing, and digital wealth. Clients come from the UK, for example, and it deals with firms such as Mattioli Woods, Wauton said. The business has inked a licencing deal with FactSet, a firm that provides financial innovation and analytics, and Tiller is having conversations with parties in the US.

Tiller is launched a new service, using a software-as-a-service offering to deliver same-day setup of its on-boarding solutions. "It allows them [clients] to upload a passport, and other document and test addresses in 27 countries in real time."

The service is aimed at clients such as lawyers, accountants, mortgage brokers and other parties where the on-boarding process is a key issue. "Anyone using AML checks as part of their job can use this," Wauton said. "This is pay-as-you-go on-boarding."

## Efficiencies

In the onboarding side, Wauton said he was sure there will be efficiencies that can be obtained in this area.

"The newer generation can't understand why everything can't be done online and from home and on a mobile."

"For most firms, all this is about offering customers as choice of how they want to engage with them," Wauton continued.

On the portfolio side of Tiller's business, there is an "ever-increasing demand for efficiencies as staff costs go up" and this creates demand for technology solutions, he said. One trend has been a desire from clients to have one source of information instead from a wide array. Covid has also created a great deal of "re-platforming" of clients, he said.

Asked about future trends, Wauton said the desire to personalise portfolios was one such development that is unfolding. The field of on-boarding becomes more complicated and expensive, he said.

"The bigger on-boarding systems will have been working with firms in the UK where there are complex client journeys. It requires a lot of time, effort and cost."

"There is a huge and growing demand for on-boarding technology and not just in our industry – this applies to any supervised business," he said. ■



**Jonathan Wauton**  
Chief Operating Officer and Co-Founder,  
Verify by Tiller



"THERE IS A **HUGE** AND **GROWING** DEMAND FOR ON-BOARDING **TECHNOLOGY** AND NOT JUST IN OUR INDUSTRY – THIS **APPLIES** TO ANY **SUPERVISED** BUSINESS."



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### ONBOARDING



### KYC



### PORTFOLIO MANAGEMENT



### CLIENT REPORTING



### CLIENT COMMUNICATIONS



### INNOVATIVE CLIENT SOLUTION



## WINNERS: INVESTMENT MANAGEMENT CATEGORIES

### OVERALL INVESTMENT MANAGER



### FUND MANAGER



### PUBLICATIONS

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## INSTITUTIONAL TRUST COMPANY



## TRUST COMPANY FUND ADMINISTRATION SERVICE



HIGHVERN



## TRUST COMPANY ESG PROGRAMME



## TRUST COMPANY EMPLOYER OF THE YEAR



## TRUST COMPANY FAMILY OFFICE SERVICES



## WINNERS: PRIVATE BANKING CATEGORIES (OVERALL)

## OVERALL PRIVATE BANK



## PURE PLAY PRIVATE BANK



## PRIVATE BANK EMPLOYER OF THE YEAR



SOCIETE GENERALE GROUP





## WINNERS: PRIVATE BANKING CATEGORIES (TEAM BASED)

### PRIVATE BANK WEALTH PLANNING TEAM

Julius Bär



### PRIVATE BANK CREDIT PROVIDER TEAM

KLEINWORT  
HAMBROS

SOCIETE GENERALE GROUP



### PRIVATE BANK ESTATE PLANNING TEAM

Emirates NBD



### PRIVATE BANK ESG/IMPACT INVESTING TEAM

standard  
chartered  
private bank



### PRIVATE BANK FAMILY OFFICE SERVICES TEAM

Emirates NBD



## WINNERS: PRIVATE CLIENT AND FIDUCIARY SERVICE CATEGORIES

### INVESTOR SERVICES

IQEQ  
Know how Know you



### LEGAL TEAM

COLLAS • CRILL



### FAMILY OFFICE GOVERNANCE

OCORIAN





## WINNERS: LEADERSHIP AND INDIVIDUAL CATEGORIES

### CHIEF EXECUTIVE OFFICER (CEO)

ANDY FINCH



### FEMALE LEADERSHIP

HEATHER TIBBO



### LEADING WEALTH MANAGER/INVESTMENT PROFESSIONAL

TIM CHILDE



### LEADING TRUST PROFESSIONAL

STEVE GULLY



### THOUGHT LEADERSHIP



### LIFETIME ACHIEVEMENT

MARK CHASEY



## WINNER: SPECIALIST CATEGORY

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WINNER: HIGHVERN



WINNER: HIGHVERN



WINNER: JTC



WINNER: JTC



WINNER: Odey Wealth Management



WINNER: Odey Wealth Management



WINNER: Verify by Tiller



WINNER: ProFundCom

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are the  
watchwords  
of the judging  
process*



## 2023 Announcements Schedule

### FEBRUARY 2023

WealthBriefing Swiss Awards  
WealthBriefing WealthTech Americas Awards

### MARCH 2023

WealthBriefing Swiss EAM Awards  
WealthBriefing European Awards

### MAY 2023

Family Wealth Report Awards

### JUNE 2023

WealthBriefingAsia Greater China Awards  
WealthBriefingAsia Awards

### JULY 2023

WealthBriefing Wealth For Good Awards

### OCTOBER 2023

WealthBriefingAsia EAM Awards

### NOVEMBER 2023

WealthBriefing MENA Awards

### DECEMBER 2023

WealthBriefing Channel Islands Awards

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