

FEBRUARY 2026

# ACCLAIM

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

The Thirteenth  
*WealthBriefing*  
Swiss Awards  
2026

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# Foreword

**STEPHEN HARRIS**  
CEO, *WealthBriefing*

In any industry – particularly one defined by rigorous standards and constant evolution – there is a vital need to recognise leading practitioners and provide a platform for excellence to be demonstrated and celebrated. The long-established *WealthBriefing* Swiss Awards programme continues to offer wealth management professionals and firms the opportunity to showcase achievement at the highest level.

Producing this awards programme remains both a privilege and a responsibility. It highlights the technical expertise and client experience that define Swiss wealth management, as well as the sector's resilience and capacity for innovation in an increasingly complex global environment.

Recent years have seen technology play an accelerating role in transforming wealth management. Digital capability, data intelligence and operational efficiency now sit alongside traditional advisory excellence, reflected across the *WealthBriefing* award categories. At the same time, the continued development of private banking and the external asset manager community underscores the diversity of the Swiss ecosystem.

At the heart of the programme lies a rigorous and transparent judging process. Judges – whose names and roles are publicly available – are selected for their independence, expertise and integrity. We thank them sincerely for their commitment to upholding the highest standards.

For participants, the awards provide an opportunity to present achievements to peers, clients and partners; for winners, they offer powerful validation of the value they deliver. Above all, the awards celebrate the finest qualities of an industry that remains essential to clients navigating uncertainty and change.

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## Overview Of The Swiss Wealth Management Sector

Switzerland retained top spot for the world's largest cross-border financial centre – at \$2.7 trillion in 2024 – according to Boston Consulting Group in its 2025 report. BCG expects this to rise to \$3.4 trillion by 2029. Stability, legal certainty, a strong domestic economy, education system and public service infrastructure – and relatively low taxes overall – are an attractive mix.

Switzerland now has one universal bank – UBS – and while total bank numbers in the country have declined to 230 in 2024 from 236 a year before, the bank population remains large, with names as Julius Baer, Lombard Odier, Syz, REYL Intesa Sanpaolo and Edmond de Rothschild, for example.

The country remains home to many banks which retain a strong family ownership structure which echoes the clientele they serve: many of these banks have been the recipient of *WealthBriefing* awards. The richness of the ecosystem is enhanced by the presence of international players such as Citi Private Bank, HSBC Global Private Banking and Barclays Private Banking which drive healthy competition in the country.

Coming into force at the start of 2026, the **Berne Financial**

**Services Agreement** (BFSA) is a pact between UK and Swiss financial services and should hopefully boost capital, talent and services flows between the countries. Both nations are non-EU member states that nevertheless do significant business in the region, and banking and wealth management have parts to play.

Along with other financial centres, Swiss wealth management has been spurred on by the momentous implementation of financial technology. The advent of AI, for example, and the many use cases that are becoming apparent for wealth management organisations, has become transformational. Zug, and its "crypto valley" is another part of the field.

As the achievements of firms such as Avaloq and ERI demonstrate, Switzerland's tech firms continue to be important parts of the global banking and wealth management ecosystem. Technology has been a real differentiator the Alpine state.

Switzerland has had to adapt. And with its standing as a stable jurisdiction in an unsettled world and an enviable quality of life, the Alpine state has been well able to attract HNW and UHNW individuals and families.



WINNER: Alpen Partners | Alpen Partners International



WINNER: Artemon Capital Partners AG



WINNER: Aurea Global Investments SA



WINNER: Avaloq



WINNER: Azqore

# The Judging Panel

The *WealthBriefing* Swiss Awards 2026 programme was focused around three main category groupings: experts (individuals and teams), products and services for wealth managers and clients, and institutions of all sizes and types in the Swiss market.

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



**NICK BEDFORD**  
Investment Manager  
**NFG Partners SA**



**MARC BERGER**  
Partner  
**EY**



**PHILIPPE BONGRAND**  
Advisor



**JUDITH CHATOO**  
Executive Director  
**Saffery Trust (Suisse)  
S.A.**



**PHILIPPE CIEUTAT**  
Chief Financial Officer  
**Edmond de Rothschild  
Group**



**JAMES DAY**  
Managing Director  
**Peritus Investment  
Consultancy**



**FABIAN DORI**  
Chief Investment Officer  
**Sygnum Bank**



**PIERRE DUPONT**  
Managing Partner  
**WIZE by TeamWork**



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



**LAURENT GAGNEBIN**  
CEO  
**Rothschild & Co Bank AG**



**VINICIUS GEROMEL**  
Founder  
**Aurea Global  
Investments SA**



**CARMEN KIAVILA**  
CEO & Founder  
**Kiavila Avocats**



**GERALDA KRAL**  
Managing Partner  
**UMA Swiss**



**MARGOT LORENZ**  
Partner and Deputy  
CEO International  
**Portas Capital AG**



**ISKRA MARTIN**  
Partner  
**Azura Partners**



**ANDREW MCCALLUM**  
Senior Partner  
**Rawlinson & Hunter**



**MARK MILES**  
Partner  
**Aon**



**KARIN MORGADE**  
Director  
**Vontobel**



**WINNER: Azura Partners**



**WINNER: Banque Heritage**



**WINNER: Barclays Private Bank**



**WINNER: Bedrock Group**



**WINNER: Banque Internationale à Luxembourg (Suisse)**

# The Judging Panel



**DANIEL MÜLLER**  
Partner and Global  
Wealth Management  
Leader  
**PwC**



**VANESSA NEIL**  
Wealth Adviser,  
Vice-President  
**Piguet Galland & Cie SA**



**FRANCK OLIGER**  
CEO and Senior Partner  
**SpeciTec SA**



**RAY SOUDAH**  
Founding Partner  
and Chairman  
**MilleniumAssociates**



**PATRICK STAUBER**  
Group Chief  
Executive Officer  
**Marcuard Heritage**



**PHILIPPE STEFFEN**  
Consultant



**NICOLAS SYZ**  
CEO  
**Syz Bank**



**RAVI VENKATARAJU**  
CEO and Founder  
**Jupiter Wealth  
Advisors Limited**



**BRUCE WEATHERILL**  
Chief Executive  
**Weatherill Consulting**



**DAVID WILSON**  
Partner  
**Schellenberg Wittmer**





## DIFFERENT BY DESIGN

**Accuro specialises in trust structures for high net worth individuals and families seeking to responsibly preserve wealth across generations.**

Being founder, management and staff owned, Accuro has the freedom to pursue its mission with passion. The way we operate and who we partner with, can only be made possible by our independence.

**GENEVA | JERSEY | LONDON | MAURITIUS**

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

# Accuro: Thoughtful Stewardship in a Changing Wealth Landscape



## Accuro

Accuro is a multi award winning trust, fiduciary and private office group that has catered to the global ultra-high-net-worth (£100m+ AuA) private wealth market for over 50 years.

What sets Accuro apart is our deep understanding of family dynamics and our commitment to being a progressive force for good – for our clients, our people, our industry and the communities we serve. Our holistic approach makes us a distinctive choice for families seeking clarity, continuity and empathy across generations and jurisdictions.

Today, Accuro oversees and administers £19+ billion in assets.

### Who inspires you, either inside or outside your organisation?

At Accuro, our primary source of inspiration is our people. Our colleagues combine technical expertise with sound judgement and empathy, often supporting families through moments of complexity and transition. They do so with discretion and calm professionalism, consistently placing clients' long term interests first, a standard that inspires us every day.

Beyond the firm, we are inspired by the clients we advise: individuals and families who navigate change with resilience, and who seek to steward their wealth in ways that reflect their values and responsibilities. Their commitment to legacy and thoughtful deployment of wealth continually reinforces the purpose behind our brand. Together, these influence shape Accuro's culture, one defined by independence, long term perspectives and stewardship rooted in care. They remind us that sustainable excellence in wealth management is built not only on expertise, but on the people who deliver it and the relationships, trust and integrity they bring to their work.

### What role has collaboration, either internally or with external partners, played in your success?

Collaboration is fundamental to Accuro's success. Internally, we

operate as a fully integrated group, drawing on expertise across jurisdictions to deliver coordinated, cross-border services for our internationally mobile clients. This ensures that advice is aligned, efficient and responsive to complex client needs.

Externally, our approach is built on deep, long-standing collaborative relationships with advisers, family offices and intermediaries. We often work as an extension of their teams, providing specialist fiduciary, structuring and administration expertise that complements their strategic, legal and tax advice. By maintaining open dialogue, clear governance and shared objectives, we help advisers and family offices deliver seamless outcomes for their clients while preserving independence.

Beyond client work, we partner with regulators and industry bodies to advance sustainable finance frameworks, reinforcing our leadership in responsible wealth management.

### What does winning this award mean to your firm, and how will you use this recognition going forward?

Accuro has always been guided by a willingness to think independently and respectfully challenge established norms, pioneering new approaches to managing wealth and legacy that place people, purpose and long-term relationships at our core.

This award demonstrates that our approach continues to be both distinctive and purposeful.

This recognition reinforces our belief that strong relationships, thoughtful stewardship, independence, and long-term thinking continue to matter to those we serve. As we enter an exciting growth chapter, we will continue to lead with purpose and conviction.

*On 22nd September 2025, Accuro was acquired (pending Regulatory Approval) by Opera Group Limited, a privately held group of fiduciary, corporate, and fund administration businesses majority owned by entrepreneur Stephen Lansdown CBE (co-founder of Hargreaves Lansdown) and the family office of Tom Scott.*

Your trusted **financial advisor and global wealth planner** in Switzerland

 **WealthBriefing** **SWISS**  
**AWARDS 2026**

**WINNER**

*International Wealth Planning Solution*

**Alpen Partners | Alpen Partners International**

**Pierre Gabris**  
CEO  
Founder



Alpen Partners | Alpen Partners International

Freienbach | Zurich | Geneva | Lugano | Switzerland

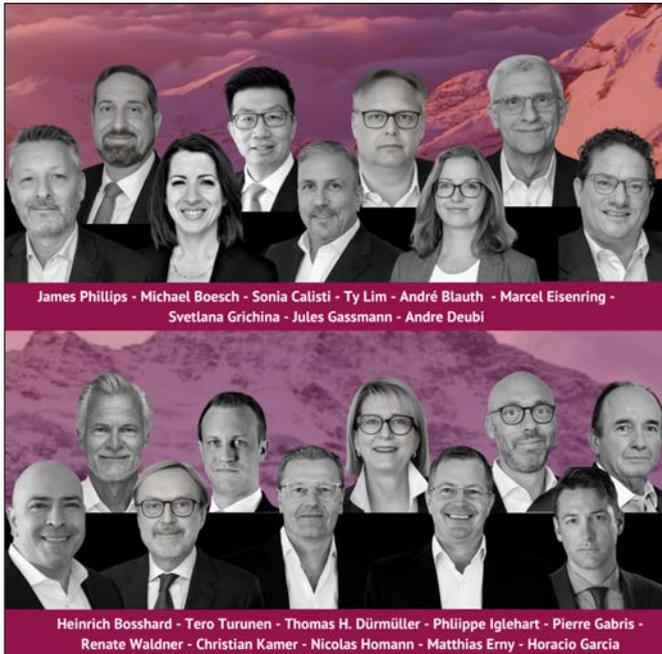
info@alpenpartners.com | +41 58 105 75 00 | alpenpartners.com

FINMA-licensed as a portfolio manager in Switzerland | CSA-licensed as a portfolio manager in Canada

info@alpeninternational.com | +41 58 105 75 50 | USA: +1 212 461 3684 | alpeninternational.com

SEC-registered as an investment advisor in the United States, serving American clients

# Designed for Global Clients, Recognised for Excellence



## What distinguishes Alpen's international wealth planning solution?

Our international solution is built specifically for globally mobile clients whose lives, assets, and families span multiple jurisdictions. Rather than adapting domestic models for cross-border use, we designed our offering from the ground up to address regulatory complexity, tax exposure, reporting obligations, and investment portability across borders. Clients benefit from a single, integrated advisory relationship that replaces fragmented advice across countries, institutions, and advisors. This holistic approach allows us to align investment management, structuring, and long-term planning under one coordinated framework regardless of where clients live or hold assets.

## How does Alpen's regulatory footprint contribute to the strength and credibility of your international solution?

A key feature is our robust and rare regulatory positioning. We are licensed in Canada as a Portfolio Manager, registered with the US Securities and Exchange Commission as an Investment Adviser, and licensed by FINMA as a Portfolio Manager in Switzerland. This multi-jurisdictional authorisation allows us to serve international clients with full regulatory legitimacy, rather than relying on work-arounds or informal structures. It supports investment continuity, compliance with local and international rules, and the standards of fiduciary duty. For clients, this translates into trust, transparency, and operational resilience across borders.

## How do you address the complex needs of international clients beyond portfolio management?

International wealth management extends far beyond asset allocation. Our solution integrates cross-border tax awareness,



## Alpen Partners | Alpen Partners International

estate and succession considerations, reporting obligations, currency management, and intergenerational planning. Whether clients are relocating, holding assets in multiple currencies, or planning for heirs in different countries, our role is to coordinate and simplify. This breadth of expertise, combined with personalised, high-touch service, is a defining factor in our recognition as an international solution provider.

## Why does Alpen's approach resonate particularly strongly with international and next-generation clients?

International and next-generation clients value independence, transparency, and alignment. As an independent firm, we are free from product bias and institutional conflicts, enabling us to act solely in our clients' best interests. Our global mindset, modern technology, and clear communication style resonate with clients who expect both sophistication and accessibility. Importantly, we understand that international wealth is dynamic. Clients' lives evolve, jurisdictions change, and regulations shift. Our solution is designed to adapt alongside them, providing long-term partnership rather than transactional advice. This forward-looking, client-centric philosophy ultimately underpins why our international wealth-management solution is appreciated by our clients from over 30 countries around the world.

## What does winning this award mean to your firm?

This recognition would not be possible without the exceptional dedication of our people. We extend our sincere thanks to our partners for their strategic leadership, to our portfolio managers for their discipline, insight, and unwavering commitment to fiduciary excellence, to our private client services and compliance teams, and supporting staff for delivering consistently thoughtful, precise, and highly personalised support. Their collaboration, professionalism, and shared commitment to serving international clients define our firm's culture and standards. This award is a reflection of their collective hard work throughout the year and it is recognition they truly deserve.

# ALTOO

## Clarity. Control. Confidence.



## The digital command center for complex wealth

Trusted by single family offices and ultra high net worth families world wide to control their wealth across all custodians, asset classes, jurisdictions and generations.

A modern, highly secure SaaS platform, 100% developed and hosted in Switzerland 

altoo.io



# Transforming Wealth Oversight Through Intelligent, Client-Led Innovation



## Altoo AG

### What has been the most impactful innovation your firm introduced recently and how has it shaped client outcomes or internal efficiency?

We work with clients whose wealth is rarely simple. It spans banks, jurisdictions and asset classes, with private investments, real assets and operating businesses alongside traditional portfolios. Altoo was built to bring clarity to this complexity by providing a single, independent view of global wealth that does not rely on any one institution.

In 2025, our most impactful innovation was a shift from aggregation to intelligence, delivering clearer insight into performance and cost through risk-adjusted analytics, FX-aware views and automated fee detection.

How this information is experienced is equally important. Refined visual reporting, including interval-based performance views and an updated Wealth Structure Report, makes complex portfolios easy to understand. What once required manual reconciliation is now continuously accurate and transparent.

For clients, the impact is tangible: less time validating data, greater confidence in decisions, and stronger governance across sophisticated wealth structures. Internally, automation has reduced reporting friction and freed teams to focus on higher-value work, resulting in a platform that supports better decision-making rather than simply organising wealth.

### What role has collaboration – either internally or with external partners – played in your success?

Collaboration underpins how Altoo operates. Internally, product, engineering and client-facing teams work in close alignment, ensuring development is grounded in real client workflows rather than abstract feature requests. This allows ideas to move quickly from observation to implementation.

Externally, clients play an equally important role. We actively involve them in shaping the platform, treating feedback as a core input rather than a post-launch exercise. Many enhancements

delivered in 2025, particularly around monitoring, fee transparency and automation, were directly informed by client discussions focused on reducing repetitive checks across complex portfolios.

Ongoing dialogue with clients and prospective users helps us stay close to how wealth is managed today, challenge assumptions and refine our roadmap, ensuring innovation remains practical and relevant.

### Can you share a story that best illustrates your team's commitment to client service or problem solving?

A clear example is the introduction of automated monitoring and alerts across fees, income and portfolio changes. Clients told us they were spending too much time identifying small but consequential discrepancies, particularly in multi-custodian environments. In response, we introduced automated fee and income alerts and management expense ratio monitoring to surface issues as they arise.

The same client-led mindset shaped features such as automated dividend forecasting, improving visibility over future cash flows and supporting more precise liquidity planning. Together, these developments remove friction from day-to-day oversight while enabling more informed decisions.

### What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

The next five years will be shaped by rising asset complexity, a generational shift in expectations, and the growing need for trust built through transparency and data integrity. As portfolios become more global and multi-entity, families and advisers need unified platforms rather than fragmented tools. Altoo addresses this through a single, independent digital platform supported by scalable infrastructure, clean data and intelligent automation that strengthens governance and enables technology to augment human advice rather than replace it.

# Access through innovation

Unlock exclusive investment opportunities in  
private real estate credit and private corporate credit  
to elevate your portfolio.



# Accessing Private Credit in Swiss Real Estate Through Innovative Solutions



**Manuel Hamel** - Co-Founder, Partner (left)  
**Samuel Krämer** - Co-Founder, Partner (right)  
**Artemon Capital Partners AG**

**A**rtemon Capital Partners is an independent private markets investment and advisory boutique headquartered in Zurich. Our flagship investment solution focuses on Swiss residential mortgage-backed subordinated loans, offering attractive risk-adjusted returns with strong downside protection. Building on this foundation, we have developed an innovative platform that enables (U)HNWI and wealth managers to access securitised real estate loans on a deal-by-deal basis through their custodian.

*We are proud to have been recognised with the WealthBriefing Award for 'Innovative Financial Product or Service', reflecting our commitment to investment innovation and bridging financing gaps in the Swiss Real estate market.*

**What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?**

Our most impactful recent innovation is the launch of our investment platform that transforms Swiss real estate mezzanine loans into investable certificates with ISINs, allowing investors to access such exposure seamlessly through their custodians. By securitising mezzanine loans on a deal-by-deal basis, the platform bridges institutional-grade investment standards with the bespoke financing needs of entrepreneurial real estate projects. For clients, this has unlocked opportunities across developments, refurbishments, and selected commercial properties, supported by flexible collateral structures such as mortgage notes, share pledges, and additional security packages. Internally, the platform has significantly increased efficiency by providing a framework for structuring, documentation, compliance, and reporting processes, allowing us to scale high-quality private credit solutions without compromising rigor, governance or investor protection.

**What role has collaboration - either internally or with external partners - played in your success?**

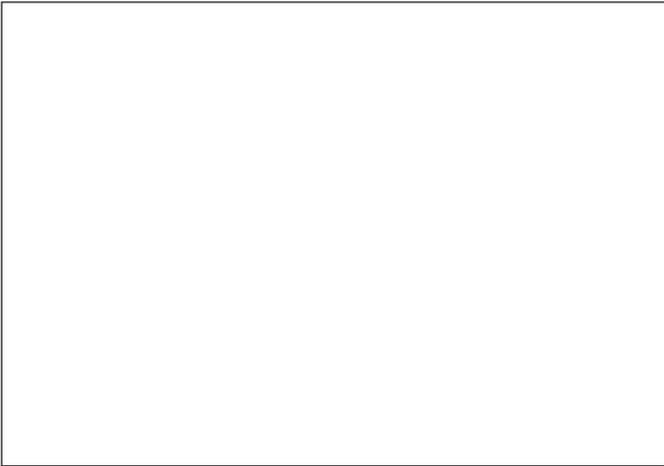
Our investment platform is built around a tailored, collaborative approach designed to deliver optimal outcomes for both investors and borrowers. Internally, our team works seamlessly across origination, investor engagement, and structuring, managing each transaction on a deal-by-deal basis from initial concept through to execution. This close alignment ensures that every solution is precisely calibrated to market demand, with well-defined return expectations and robust downside protection. Externally, we collaborate closely with specialist service providers during the due diligence phase, legal advisors and paying agents to ensure each transaction meets institutional-grade standards. This integrated ecosystem enables us to combine deep local real estate expertise with sophisticated financial engineering, resulting in high-quality investment solutions.

**Where do you draw inspiration for innovation - within the wealth industry or beyond it?**

Our inspiration for innovation is primarily driven by the evolving needs of our borrowers and the expectations of our investors. We work closely with real estate companies to understand their financing challenges, particularly in an environment where traditional bank lending has become more restrictive. At the same time, we design solutions that meet the requirements of professional investors seeking predictable cash flows, capital protection, and transparency. A key driver of this approach is our anticipation of regulatory developments, including Basel III Final, which is materially impacting real estate financing in Switzerland through higher capital requirements for development loans and changes to valuation principles. By aligning borrower demand with investor expectations and embedding regulatory foresight into our structuring process, we develop forward-looking, resilient investment solutions that challenge traditional financing models and enhance access to sophisticated real estate debt within modern wealth management portfolios.



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**Aurea Global Investments SA**



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**avalog**

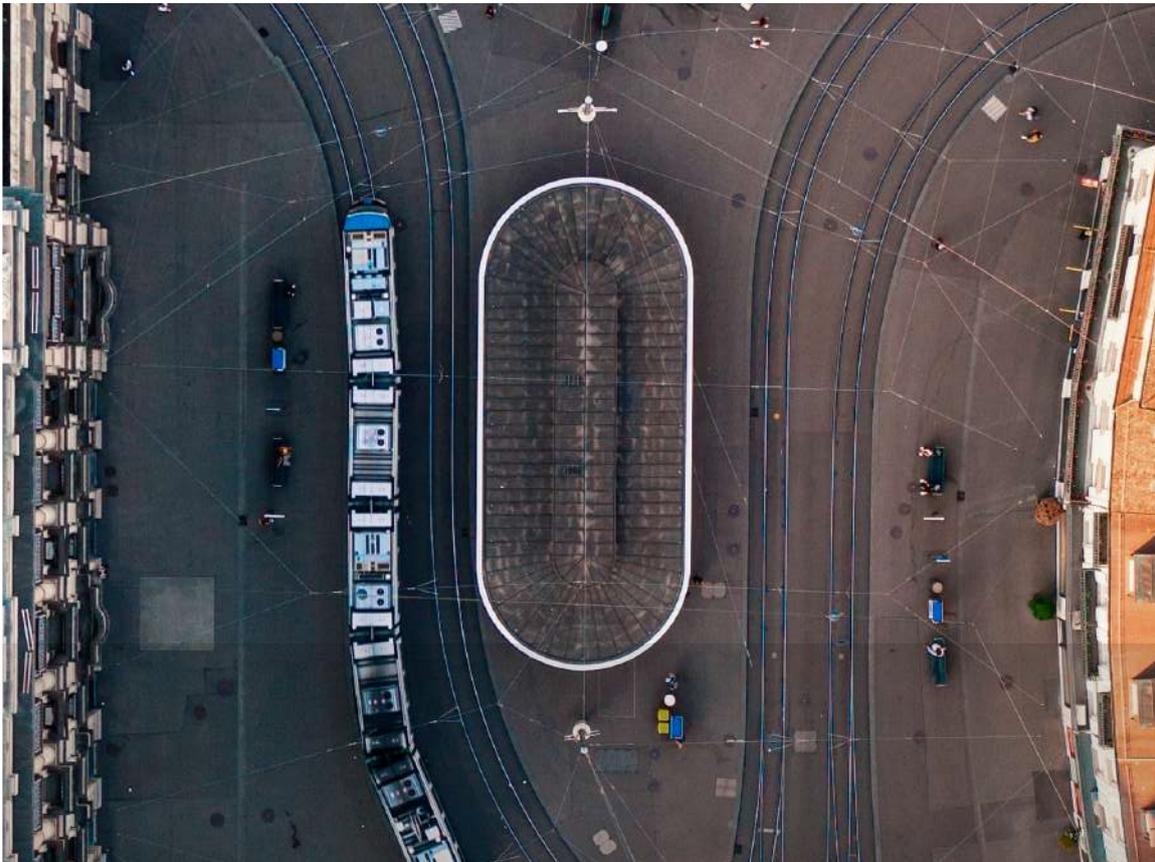
An NEC Company

Global finance.  
Local insights.

**78%**

of Swiss investors are reconsidering their wealth manager.

Download the Avalog wealth insights 2025 report to discover more key findings from Swiss investors and wealth professionals.



Expand your view with Avalog

# Avaloq recognised for Excellence in Front Office Solutions



**Christian Haux**  
Head of Client Management  
Switzerland and Liechtenstein  
**Avaloq**

## Please explain why your business was able to reach this award-winning level?

Avaloq offers a unified platform integrating core banking, digital banking channels and front office capabilities, with specialized client and investment management software. Our platform supports more than 170 financial institutions worldwide, with over 4 trillion Swiss francs in client assets managed with Avaloq software.

The Avaloq platform's front office capabilities enable wealth managers to enhance efficiency, compliance and client service. Our solution automates key processes such as investment suitability checks, portfolio construction and risk analytics, while also supporting mass monitoring and rebalancing. Configurable health checks ensure portfolios stay aligned with risk tolerance, and automated regulatory checks streamline compliance. Also, the platform simplifies client management by offering a centralised interface for daily tasks, transactions and client data. Our lifecycle management tools further support timely onboarding and relationship management, boosting front office productivity.

Our clients benefit from our continuous investment in the platform, combined with our understanding of the wealth management sector. Last year, we proudly celebrated 40 years of innovation and client success – born out of our home market of Switzerland – reflecting our long-standing commitment to driving digital transformation in wealth management.

## How do you intend to remain on the front foot and continue to set a high standard?

The Avaloq platform impressed the judges for its truly front-to-back integration, unifying CRM, investment management, mobile banking, digital communication and crypto capabilities in one seamless platform. By streamlining adviser workflows, enhancing client engagement and accelerating digital transformation, it delivers a modern, unified front-office ecosystem for wealth managers.

Avaloq invests 25% of annual software revenue in research and development (R&D) to enhance the platform's capabilities, ensuring our clients stay at the forefront of technology. In addition, we actively monitor regulatory changes across markets and integrate updates directly into our platform, enabling our clients to stay compliant without diverting focus from their core operations.

Our open platform, extensive partner ecosystem and advanced API technology allow our clients to seamlessly roll out new services and integrate third-party applications, harmonised on a single platform with a unified data model for consistency across operations.

Furthermore, our client community benefits from shared insights and joint innovation projects, contributing to the platform's continuous, long-term development.

## Where do you see the wealth management sector going in the next five years?

We expect wealth managers to face increased competition and margin pressure, driving demand for highly efficient, standardised operations. Financial institutions will need to leverage technology to boost operational efficiency and deliver personalised client experiences.

From now until 2030, digitalisation will continue to gain traction in the sector, with a focus on automation, data analytics and artificial intelligence. These technologies will enable wealth managers to provide tailored advice and tools that meet evolving client expectations at scale. Additionally, wealth managers will have to deal with increasingly complex regulatory requirements, increasing the need for integrated compliance that can adapt to evolving standards.

Our platform's flexibility and comprehensive capabilities ensure that our clients can confidently navigate these changes, maintaining a competitive edge in one of the most competitive markets in wealth management: Switzerland.



# AW+SWITZERLAND

A directory of Swiss wealth management, private banking, and other services for US, Canadian, and Latin American citizens, residents, and expats



**Wealth**Briefing **SWISS**  
**AWARDS 2026**

**WINNER**

*Marketing Individual*

**Anne Liebgott**

**AW+SWITZERLAND**



[americanswelcome.swiss](http://americanswelcome.swiss)

# The Long View on Marketing: Craft, Consistency, and the Responsible Use of AI

## What does receiving the *WealthBriefing* Swiss Award 2026 for 'Marketing Individual' mean to you?

Receiving the award is both an honor and a reflection of many years spent working across the full spectrum of marketing disciplines. For me, it validates the idea that strong marketing is not about chasing trends, but about building relevance, credibility, and continuity over time, especially in a sector as trust-driven and regulated as wealth management.

## Why is it important to remain up to date on both traditional and digital marketing?

Marketing does not exist in silos. Traditional marketing, brand positioning, narrative development, print, events, and long-form thought leadership, remains foundational. These elements establish authority and depth. Digital marketing, on the other hand, determines how that authority is distributed, discovered, and engaged with today. Staying current in both ensures consistency across touchpoints. Clients and prospects may encounter a firm through a printed report, a conference panel, LinkedIn, or an AI-powered search result. The message must feel coherent everywhere.

## How do you see the role of AI fitting into modern marketing?

AI is a powerful accelerator, but it is not a replacement for judgment or experience. Proper use of AI enhances research, content structuring, personalisation, and distribution efficiency. Misuse, however, can dilute brand voice or create compliance risk. That is why governance, intent, and human oversight matter. I've completed formal training as a Chief AI Officer (CAIO), which deepened my understanding of how to integrate AI responsibly, aligning it with brand strategy, regulatory expectations, and long-term value creation rather than short-term output.

## You are known for producing marketing materials that work both standalone and as part of broader social media strategies. Why is that balance important?

Each piece of content should be able to stand on its own, whether it's an article, visual, or campaign theme, while also fitting into a wider ecosystem. A strong standalone asset builds credibility and trust. When thoughtfully adapted across platforms, it extends reach without losing substance. I find this particularly enjoyable: shaping a core idea and then translating it into different formats and tones for LinkedIn, newsletters, websites, or longer-term brand narratives, without fragmenting the message.

## How does long-term experience influence your current marketing approach?

Having worked across multiple marketing cycles – pre-digital, early digital, social media expansion, and now AI-driven environment – I've seen what endures and what fades. That experience creates perspective. It helps distinguish structural shifts from temporary noise. Understanding how audiences evolve, how platforms rise and fall, and how brands mature allows for more accurate decisions today and a more confident step into the future.

## What advice would you give to marketing professionals in financial services today?

Respect the fundamentals, embrace technology thoughtfully, and take full ownership of your message. Marketing in this industry is built on trust over time. Those who combine experience, curiosity, and disciplined innovation will remain relevant, regardless of how the tools evolve.



**Anne Liebgott**

Founder

**AW+SWITZERLAND**



**Business  
& Tech partners**

**for wealth  
managers**



**+30**

**YEARS OF  
EXISTANCE**



**+20**

**CLIENTS**



**+750**

**EMPLOYEES**



**+200**

**Bn (CHF) ASSETS  
UNDER  
MANAGEMENT**

the **banking &  
tech platform** by  
and for wealth  
managers

**A Z Q O R E**

# Azqore's Blueprint for the Future of Digital Wealth Management



**Rodolphe Kunze**  
CIO  
Azqore

**B**ased in Switzerland, Azqore is a digital service provider specialising in core banking outsourcing and transaction processing for private banks. With over 30 years' experience, it delivers SaaS solutions across the full wealth management value chain and supports large-scale core-banking migrations. Azqore serves 20 clients across Europe and Asia, representing around CHF 200 billion in assets under management, and is a subsidiary of Indosuez Wealth Management, part of the Crédit Agricole Group.

## Why has Azqore been able to reach this award-winning level?

Our success is driven by two fundamental pillars:

### *A comprehensive, forward-looking technology platform*

Azqore offers a versatile front-to-back Wealth Management platform, built around our S2i core-banking system and its ecosystem, available in both SaaS and BPO operating models.

We invest over CHF 50 million annually in IT and platform evolution to ensure our solutions remain fully aligned with regulatory requirements while anticipating digital and functional market trends. This sustained investment enables all clients to run on the latest platform versions, creating economies of scale and benefiting from robust, industrialised frameworks certified under ISO 9001, ISO 27001, and ISAE 3000 / 3402 standards.

### *A deeply rooted customer-centric culture*

At the heart of Azqore's approach is a strong commitment to understanding and supporting each client's unique needs. We see ourselves not simply as a service provider, but as a long-term partner supporting our customers' strategic ambitions.

As a subsidiary of Indosuez Wealth Management, this customer-centric mindset and in-depth understanding of private banking are firmly embedded in our DNA, enabling us to deliver both tailored solutions and high-quality, personalised support.

## How do you intend to remain on the front foot and continue to set a high standard?

We will continue to focus on two complementary priorities.

First, we will maintain strong investments in functional and regulatory evolution. While these may be considered fundamentals; we firmly believe that excellence in these areas is a prerequisite for long-term success in wealth management.

In parallel, we are undertaking a major transformation of our Wealth Management Platform to fully embrace the opportunities created by artificial intelligence, data-driven use cases, and digital channels. This transformation goes beyond technology alone: it also includes organisational, methodological, and human aspects, ensuring a holistic evolution of our operating model.

Our objective is to equip our clients with a future-ready platform that enables them to adapt efficiently to changing market expectations and evolving client behaviours.

## Where do you see the wider wealth management sector going in the next five years?

Over the next five years, the wealth management industry will experience a profound shift towards digital-first and data-driven operating models, with the growing challenge of integrating AI effectively and responsibly into core processes.

At the same time, regulatory requirements will continue to intensify, particularly around ESG, cybersecurity, data protection, and client transparency.

In this rapidly evolving environment, our mission is clear: to support tomorrow's private bankers and wealth managers by providing continuously evolving IT platforms that combine advanced user experiences, effective data management, and strong regulatory compliance.

By remaining at the forefront of digital innovation and embedding AI and data analytics into our solutions, Azqore is well positioned to be the partner of choice for private banks and wealth managers seeking sustainable digital and operational transformation.





# Private Wealth. Global Access.

At Azura Partners, we manage your wealth to protect and grow your legacy.

Serving global citizens whose lives span continents and cultures, we deliver a full suite of services that brings the best of international finance to our clients.

*Because life rewards those who don't just respond, but anticipate.*

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Monaco ● London ● Geneva ● Dubai ● New York ● Miami ● Singapore



# Trust, Continuity and the Human Side of Wealth



**Iskra Martin**  
Partner  
Azura Partners

## Where do you draw inspiration for innovation - within the wealth industry or beyond it?

I draw inspiration from both within and beyond the wealth industry. The evolving regulatory and compliance environment requires us to adapt while meeting client expectations and maintaining trust, demanding discipline, creativity and continuous learning.

Some of my greatest inspiration comes from our clients, particularly the second and third generations of wealth. Many have been educated abroad, bringing a broad international perspective and strong financial knowledge combined with diverse interests. They challenge us to stay ahead and propose ideas and solutions they may not yet have considered.

What inspires me most is that this goes far beyond technicality and numbers. Technology and AI can support analysis and execution but cannot replace human exchange. Learning from one another, between advisor and client, is what makes this profession engaging. That dialogue keeps the work meaningful and makes me excited to come to work every day.

## What are the key challenges you foresee in wealth management over the next five years and how are you positioning your business to meet them?

One of the defining challenges over the next five years will be the Great Wealth Transfer. Over the next 20-30 years, we will see an unprecedented shift of wealth from one generation to the next, and it is not simply financial - it is a transfer of responsibility, values and decision-making power.

Families often navigate different perspectives between generations on risk and long-term objectives. Without the right governance and structure, this transition can create misalignment.

At the same time, wealth is becoming more complex. Families are increasingly global, assets span multiple jurisdictions, and private markets play a larger role in portfolios. Trust, transparency, and presence in key moments are therefore critical.

## How do you identify and develop future leaders within your organisation?

For me, leadership is not about title. It is about devotion and accountability.

I look for people who are curious, disciplined and willing to learn as well as respectful towards others. We invest time in mentoring, not just within client teams but across the firm.

Developing future leaders also means creating an environment where people feel supported, trusted and challenged. That culture is something Azura Partners takes very seriously.

## What does winning the Women in Wealth award mean to you?

This award is deeply meaningful to me. It reflects the trust of my clients and the respect of my colleagues, which matters more than anything.

Wealth management has not always been an easy industry for women to progress in, particularly at senior levels. I am proud to represent a model of leadership based on expertise, integrity and human connection. I hope it encourages more women to see this industry as a place where they can build long and fulfilling careers.

## What does winning the Best Family Office award mean for your firm?

I am incredibly proud that Azura Partners has been recognised for its family office offering. It validates the way we work every day.

Family office clients need independence, governance and clarity. This award recognises that we deliver institutional-quality infrastructure while remaining personal and flexible. It also reinforces that our growth has been built on substance rather than scale for its own sake.





# A long-term banking partner for your ambitions.

Your ambitions lie at the heart of everything we do. We support your projects with a forward-looking approach that addresses today's needs while anticipating tomorrow's challenges and opportunities.

Let's become partners, and contribute to the prosperity of the Swiss economy by opening up our perspectives - together.

**Open new perspectives. Together.**

**cic.ch**

# Opening New Perspectives – A Long-Term Partnership Commitment



## Bank CIC (Switzerland) Ltd.



(Left to right) **Matthias Kälin** - Chief Operations Officer; **Mirko Angelini** - Chief Finance Officer; **Livia Moretti** - Chief Executive Officer; **David Fusi** - Chief Business Officer and **Yves Aeschlimann** - Chief Risk Officer

Founded in 1871 by Basel entrepreneurs to address the financial needs of regional companies, CIC (Switzerland) is a long-term player in the Swiss financial landscape. Today, 490 employees across the three language regions serve large and medium-sized enterprises, entrepreneurs and high-net-worth individuals. The bank supports its clients at every stage of their personal lives and across their businesses' value chains.

The CIC (Switzerland) 360-degree approach covers financing, investment and savings based on a range of products and services, including wealth management, mortgages and corporate finance. Drawing on the Swiss banking tradition, it combines local expertise with the international financial strength of its French parent group, Crédit Mutuel Alliance Fédérale, one of Europe's most innovative banks.

### How do you cultivate a culture that consistently drives excellence and high performance?

Our corporate culture is based on three key values that guide us every day: Collective. Effective. Supportive. They reflect our ambition, our commitment to our clients, and our contribution to society.

With excellence as our bedrock, we set high standards and strive for exceptional performance. We embrace a solution-oriented approach, identify opportunities and respond to challenges pragmatically. Moreover, we

foster an entrepreneurial spirit, coupled with determination and creativity, among our employees to design solutions that meet our clients' and partners' expectations.

### What role has collaboration - either internally or with external partners - played in your success?

Collaboration is key to our success and a cornerstone of our corporate values. We believe in the added value created by joining forces, whether within our bank and Group, or with our clients, partners and wider network. Our commitment to diversity of perspectives and opinions enables us to bring together people around a shared vision. This synergy is also rooted in loyalty to the company and its objectives. This unity enables us to develop innovative, sustainable solutions that drive our growth and make a positive contribution to the Swiss economy.

### What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

The competitiveness of the Swiss financial sector will depend on its ability to remain committed to three key principles: anticipation, coherence and proportionality. It will be essential to anticipate crises rather than respond to them. At the same time, technological advances will continue to reshape the industry, creating both opportunities and responsibilities.

Regulatory developments will also require ongoing adaptation. We advocate for adequate regulation and supervision that are designed and implemented with coherence and proportionality to ensure stability without stifling innovation. In an increasingly complex political and economic environment, banks have a critical role to play in helping clients to navigate uncertainty and develop resilient, long-term strategies. In this context, CIC (Switzerland) is positioning itself as a trusted partner, combining expertise, foresight and disciplined risk management.

### What does winning this award mean to your firm, and how will you use this recognition going forward?

Above all, this recognition acknowledges the commitment, expertise and dedication of our teams. It fosters a strong sense of pride and serves as a powerful motivator throughout the organisation. Externally, it strengthens our reputation with industry peers and partners, underlining our role as a key player in the Swiss financial landscape.

Looking ahead, this award encourages us to contribute further to industry dialogue and adopt the role of thought leaders. It creates new opportunities for us to share our perspectives, strengthen our partnerships and continue delivering high-value solutions based on excellence, responsibility and a long-term vision.



# Think. Act. Thrive.

Because meaningful wealth requires vision, commitment, and patience.

We help families and entrepreneurs turn ambition into lasting prosperity.



BANQUE  
**HERITAGE**

[www.heritage.ch](http://www.heritage.ch)

# The Invisible Alpha: Culture as the True Measure of Performance



## Banque Heritage

While the financial industry remains largely focused on performance metrics, it often overlooks the most critical leading indicator: corporate culture. In an environment where market complexity is accelerating, culture is not a soft concept or a secondary concern – it has become an essential strategic lever.

Founded in Geneva in 1986, Banque Heritage is an independent, family-owned Swiss private bank active in wealth management and asset management. With around 200 employees across Switzerland and Latin America, the bank serves entrepreneurs, families, external asset managers and institutional investors with a long-term perspective.

Michael Welti explains how the bank's organisational model, collaborative mindset and open-architecture approach have become strategic levers of long-term performance and client trust.

### How do you cultivate a culture that consistently drives excellence and high performance?

For us, performance starts inside the organisation. In a human-scale structure, the distance between decision and execution is intentionally short. This structural choice turns speed to become an operational advantage. Our teams operate in direct contact with decision-makers, which facilitates rapid implementation and clearer accountability. When organisations remain compact, individual contribution is more visible, incentives are better aligned, and execution quality improves.

In an industry where adaptability increasingly defines competitive positioning, this operational fluidity becomes a foundation of sustainable performance.

This is where our purpose – *Sharing Success* – moves from principle to practice. It begins internally. Collaboration enables us to break

down the silos that still exist in much of the industry. Intellectual challenge, diversity of expertise and analytical humility are essential to the quality of our decisions.

### What role has collaboration – internally and with external partners – played in your success?

It is central to our model. We operate on an open-architecture basis, without proprietary product bias. This allows us to work with specialist partners across asset classes and strategies, selecting solutions purely on merit.

The ability to combine, coordinate and challenge multiple expert perspectives around a single client is a structural advantage. For clients – both private individuals and external asset managers – this independence is not a philosophical concept; it is a condition of trust. It ensures that investment recommendations are driven by intrinsic quality and alignment with long-term objectives rather than internal constraints.

As market complexity rises, this discipline in capital allocation becomes increasingly valuable.

### How do you see this positioning evolving?

The industry is moving toward greater standardisation, driven by regulation, scale and technology. As the industry gravitates toward standardisation, genuine differentiation increasingly lies in a bank's culture.

The alignment of structural agility, collective intelligence and intellectual independence forms the quiet engine of performance and trust. It is not easily replicated, but it is precisely this organisational architecture that enables Banque Heritage to operate with consistency, clarity and resilience over time.

GENEVA | LUGANO | ZURICH | LUXEMBOURG | BEIJING

The bank  
to meet  
both your  
personal and  
corporate  
needs.



SUISSE

Swiss tradition | European roots | Eastern expertise

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# Redefining Swiss Wealth Management for the Next Generation

## What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

Over the next five years, Swiss wealth management will be defined by margin pressure, rising regulatory and compliance complexity. At the same time, a large intergenerational wealth transfer, higher expectations for truly personalised advice, and stronger competition from Fintechs, independent players and global hubs will challenge Switzerland's traditional model.

Our response is clear. In Switzerland, BIL has deliberately positioned itself as a focused boutique for internationally active entrepreneurs and families. We combine private and corporate wealth management, global advisory and financing capabilities in one integrated model. That allows us to act as a long-term partner across business, liquidity events and private wealth – “Institutional strength, personal commitment”.

## What does winning this award mean to your firm, and how will you use this recognition going forward?

Winning this award is a clear validation that we are taking the right approach in how we leverage technology. It shows that we are selecting the right challenges to address, focusing our investments where technology can create measurable impact – for our clients, our people, and the efficiency and resilience of our operations.

What this recognition also highlights is how our teams are increasingly embracing this journey. Across the organisation, colleagues are engaging more openly with new ways of working, exploring their potential and integrating them step by step into daily work. This growing confidence and willingness to experiment is essential – it is how innovation becomes part of our culture rather than a standalone initiative.

Going forward, the award reinforces our confidence in this strategic, but focused, pragmatic approach. It motivates us to continue investing thoughtfully, scaling the use cases that bring the most value, and ensuring that innovation becomes a natural part of how we work – always with the ambition to deliver a superior experience to internationally active entrepreneurs and families.

## What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?

One of our most impactful recent innovations has been the rollout of two Group wide AI powered internal collaboration tools – BILGPT and Polaris – now fully available to all employees in Switzerland. Their launch represents a major step forward in bringing “Everyday AI” into the core of our Wealth Management operations.

The deployment of these tools in Switzerland was made possible through outstanding collaboration between our IT teams in Zurich and colleagues in Luxembourg, who ensured seamless integration despite complex regulatory and technical requirements. This project shows that an effective AI strategy not only depends on technology, but also about clear accountabilities and an aligned leadership team, able to make coherent choices in a evolving reality.



**Nadia Bargetzi**  
Head of Wealth Management  
**Banque Internationale**  
**à Luxembourg (Suisse)**







**WINNER: Bank CIC (Switzerland) Ltd.**



**WINNER: Dr. J. Bollag & Cie. AG**



**WINNER: EFG Private Bank**



**WINNER: ELIA Investment Advisors AG**



**WINNER: ERI**



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**Influence tomorrow**

 **BARCLAYS** | Private Bank

# Barclays Switzerland: Setting the Standard in Private Banking



**Rahim Daya - CEO**  
**Barclays Private Bank,**  
**Switzerland**

**B**arclays Private Bank delivers a comprehensive suite of specialist investment, banking, lending, and wealth advisory solutions to the world's most influential individuals and their families across 40 countries, supported by a global network of private bankers. By harnessing the full strength of the wider Barclays Group and its more than 300-year heritage, we tailor opportunities that align with our clients' unique ambitions, surrounding them with the expertise they need to invest in the future and influence tomorrow with confidence.

## What was the way your colleagues made the difference?

Our colleagues have been fundamental to this achievement. Their unwavering focus on understanding each client's individual needs, combined with the delivery of highly personalised solutions, truly differentiates our business. They consistently go above and beyond to build long-term relationships grounded in trust and reliability, and it is their passion, dedication, and expertise that set the standard for excellence. In periods of sustained volatility and unpredictability, colleagues lead the aura of calm with our clients. If colleagues panic, clients panic.

## Please explain why your Teams were able to achieve this award-winning level?

The three awards we have received this year reflect a collective commitment to excellence across our organisation. First and foremost, our leadership team is united by a clear and shared vision, which permeates every level of the business. Collaboration, accountability, and a client-first mindset guide our decision-making, while empowering our teams with the right tools and resources enables them to perform at the highest level. These awards are a testament to our leadership's strategic foresight and sustained commitment to excellence.

Our Swiss Domestic team brings together the strength of a boldly global perspective with deep, on-the-ground market expertise, built over 40 years of presence in Switzerland. This powerful combination allows us to deliver advice that is both globally informed and locally relevant.

Last but not least, the Marketing award recognises the team's success in bringing our 'Influence Tomorrow' brand positioning to life through distinctive, highly curated events, and impactful advertising campaigns that consistently reinforce our purpose and deepen emotional connection with clients.

## Where do you see the wider private banking sector going in the next five years?

While other popular private banking booking locations continue to grow, in my view, Switzerland will remain a cornerstone of global private banking, known for stability, expertise, and trust. The sector as a whole has entered a period of rapid transformation. Clients face increasing complexity across markets, regulation, and geopolitics, and expect seamless access to global capabilities alongside highly personalised, locally relevant advice. There is lots of misinformation out there and advisors like ours are required to bring clarity and fact to the various global narratives.

Over the next five years, Swiss private banking will become more digitally enabled and data-driven, with technology enhancing the human advisory relationship. Sustainability, intergenerational wealth transfer, and purpose-driven investing will move further into the mainstream, as clients seek to align capital with long-term impact. Success will go to institutions that combine trusted advisory heritage with innovation, global reach, and a truly client-centric approach.



# BEDROCK

WE  
OPEN  
DOORS  
OTHERS  
CAN'T

Find out how



# Bringing Together Expertise to Help Families Grow Their Wealth

**B**edrock Group is a multi-family office with a presence in London, Geneva, Monaco, and Lisbon. For more than two decades, we have partnered with a select group of ultra-high-net-worth families and institutions, acting as architects of their total wealth: looking far beyond individual investments to how assets are structured, owned, protected, and monitored.

Our holistic 360° approach integrates investment management, private market access, consolidated reporting, succession planning, philanthropy, and family governance frameworks, while also simplifying complexities through accounting, art advisory, and lifestyle management.

Supported by our global network and unified team of specialists across major asset classes, we bring together the right expertise and perspectives. This collective strength enables us to deliver tailored, multidimensional solutions that evolve with each family's priorities and to open doors to opportunities that would otherwise remain out of reach.

As a FINMA-authorised firm, we oversee more than CHF 7 billion on behalf of 220 families, delivering solutions that combine independence, expertise, and global reach.

## What role has collaboration - either internally or with external partners - played in your success?

Over the past two decades, we have built a global ecosystem of leading entrepreneurs, innovators, investors, philanthropists, fund managers, and custodians. Collaborating with this network enables us to draw on a breath of knowledge and bring together the right expertise to address the full complexity of a family's wealth and long term vision.

Through these partnerships, we are able to open doors others cannot. For example, through our long standing partnership with TOP Venture, clients gain exposure to highly curated pre-IPO technology investments and top-tier venture funds, accessing

visionary founders and category-defining companies in Silicon Valley that are shaping the future. This collaboration has placed families at the table for some of the most successful technology exits in recent years.

Similarly, our Bedrock Real Estate team collaborates with long standing, market leading partners including operators, developers, and sponsors to unlock access to opportunities that would not otherwise be available to private families. This includes opening doors to a curated pipeline of high quality, carefully structured, sponsor led club deals across London, Paris, and New York.

Collaboration also extends beyond the financial aspects of wealth management. Our Female Principals Series exemplifies this, providing a community driven platform that opens doors for women leading their families' wealth. It brings female principals together to share experience and expertise, and to engage in peer to peer dialogue on investment strategy, governance, entrepreneurship, and legacy - enabling conversations that rarely occur in traditional wealth settings.

## What does winning this award mean to your firm, and how will you use this recognition going forward?

Winning this award is a tremendous honour and a meaningful affirmation of the principles that define who we are as a firm. It reflects the dedication of our team and their commitment to acting in the best interests of the families we serve. Our values - Aligned, Connected and Independent - underpin everything we do, and this recognition reinforces that staying true to them delivers positive results.

Looking ahead, this award motivates us to keep raising the bar for our clients by deepening partnerships, expanding capabilities, unlocking new opportunities, and strengthening our services. Our goal is to ensure clients continue to benefit from the highest standards of expertise and care.



**Maurice Ephrati**  
Managing Partner  
Bedrock Group





Capital Banking Solutions  
EXPERIENCE INNOVATION

*Global leader in banking software solutions*

## CapitalPrivate

Wealth Management Platform - PaaS

## CapitalCompliance

Anti-Money Laundering and Tax-Evasion Platform

MODULAR • CONNECTED • COMPLIANT

### **PMS | CRM | AML | ESG | Reporting**

A single platform to unify wealth management and compliance.

### **Open & modular architecture**

Native connectivity with core banking systems, custodians, and third-party solutions.

### **Web & Mobile Applications**

A seamless experience for clients and teams.

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# How CBS Is Redefining Wealth Management with AI-Powered Compliance



## Capital Banking Solution

Active in the financial technology sector for over 25 years, Capital Banking Solutions (CBS) is an international software provider supporting financial institutions through their digital transformation. With nearly 400 employees across 8 offices worldwide, CBS serves more than 200 financial institutions in 60 countries, generating €44 million in revenue in 2024.

CBS delivers mission-critical platforms across Core Banking, Digital Banking, CRM, Compliance/AML, and Wealth & Portfolio Management. Its flagship wealth solution, CapitalPrivate, is a modular SaaS/PaaS platform designed for private banks, wealth managers, and family offices, unifying portfolio management, CRM, compliance, order execution, and reporting in one secure ecosystem.

### What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes?

The most impactful innovation has been the deep integration of compliance and portfolio management within CapitalPrivate, powered by AI-driven AML and screening capabilities. Rather than treating compliance as a parallel or external process, we embedded it directly into the portfolio lifecycle.

Through our strategic partnership with Polixis, and integrations with World-Check, Dow Jones, and LexisNexis, clients benefit from automated name screening, PEP detection, adverse media monitoring, and transaction oversight, without operational friction.

For clients, this translates into faster onboarding, fewer false positives, reduced regulatory risk, and a measurable improvement in operational efficiency. For relationship managers, it means spending less time navigating systems and more time advising clients.

### What role has collaboration played in your success?

Collaboration is structural to how CBS operates. Internally, our product teams bring together compliance experts, portfolio specialists, engineers, and client-facing consultants to ensure

solutions are built from real-world use cases, not theory.

Externally, partnerships are central to our value proposition. By collaborating with leading data providers, custodians, and technology partners, such as SIX, Bloomberg, Polixis, and major FIX hubs, we ensure our clients operate within an open, interoperable ecosystem rather than a closed system.

This approach allows institutions to scale, integrate, and evolve without vendor lock in, which is increasingly critical in today's regulatory and technological environment.

### What are the key challenges you foresee in wealth management over the next five years?

The next five years will be defined by three pressures: regulatory intensity, margin compression, and rising client expectations for transparency and digital access.

Wealth managers will need platforms that are compliant by design, cloud-ready, and capable of consolidating multi-custodian, multi-asset portfolios in real time. At the same time, end clients will expect mobile access, clear reporting, and secure digital interaction.

CBS is addressing this by accelerating its Azure-based PaaS standardisation, expanding mobile and client-facing capabilities, and continuing to invest in AI-driven compliance and data intelligence, ensuring our clients stay ahead rather than react.

### What does winning this award mean to your firm?

Winning the *WealthBriefing* Swiss Award for 'Best Portfolio Management Solution' would validate a long-term strategy focused on clarity, trust, and execution. It recognises not only CapitalPrivate as a platform, but also the people behind it, our teams and our clients, who work daily at the intersection of technology, regulation, and client service.

We will use this recognition to reinforce our commitment to innovation, deepen partnerships in Switzerland, and continue setting the standard for next-generation portfolio management.

# Protect Your Interests in Times of Uncertainty

Integrated family office services  
Estate planning and trust law  
Immigration law  
Tax & finance advisory  
Corporate law



# Integrated Advisory Excellence: The Impact of Dr. J. Bollag & Cie. AG's Seamless Legal Model

## What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?

For nearly five decades, Dr. J. Bollag & Cie. AG has focused on one core principle: providing clients with comprehensive legal advice through a single point of contact. The most impactful development has been the consistent expansion of our fully integrated advisory model, allowing legal, tax, corporate, and private client matters to be handled seamlessly under one roof.

Today's legal questions rarely exist in isolation. Inheritance, relocation, corporate structuring, and family law are deeply interconnected. Our model eliminates the need for clients to coordinate multiple advisors and ensures that legal decisions are assessed holistically, with long-term implications in mind. This structure allows clients to act confidently, knowing that downstream risks have already been considered.

## How do you cultivate a culture that consistently drives excellence and high performance?

Our culture is shaped by continuity, precision, and long-term thinking. Many of our professionals have been with the firm for decades, which creates deep institutional knowledge and strong client relationships built on trust.

We place strong emphasis on intellectual curiosity and ongoing knowledge exchange. Legal frameworks evolve, families become more international, and structures grow more complex. Our advisors are expected to stay ahead of these developments and to share insights internally.

Above all, our guiding principle remains unchanged: legal advice should simplify a client's life, not complicate it. Every solution we develop is measured against that standard.

## What role has collaboration played in your success?

Our partnership with Tramondo Investment Partners gives clients something unusual for a private client law firm: seamless access to asset management alongside legal and family office services. When estate planning requires an understanding of portfolio liquidity or a relocation needs coordinating with investment mandates, we work as a single team.

Externally, we maintain relationships with specialist litigation counsel across practice areas. We handle advisory work; they handle the courtroom when required. This preserves our focus whilst ensuring clients have trial specialists if matters escalate.

Within the firm, colleagues in tax, immigration, corporate law, and estate planning collaborate daily. The weekly case review, which means examining complex matters across specialties, has been a feature since the 1980s. It helps us identify problems earlier and develop more robust solutions.

## What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

The main challenge is timing. Clients often seek legal advice too late, after a dispute or missed deadline. Early involvement prevents costly consequences – an estate plan reviewed before a second marriage or a company structured with an eventual exit in mind avoids problems. We foster ongoing advisory relationships, allowing us to anticipate issues and help clients avoid surprises.

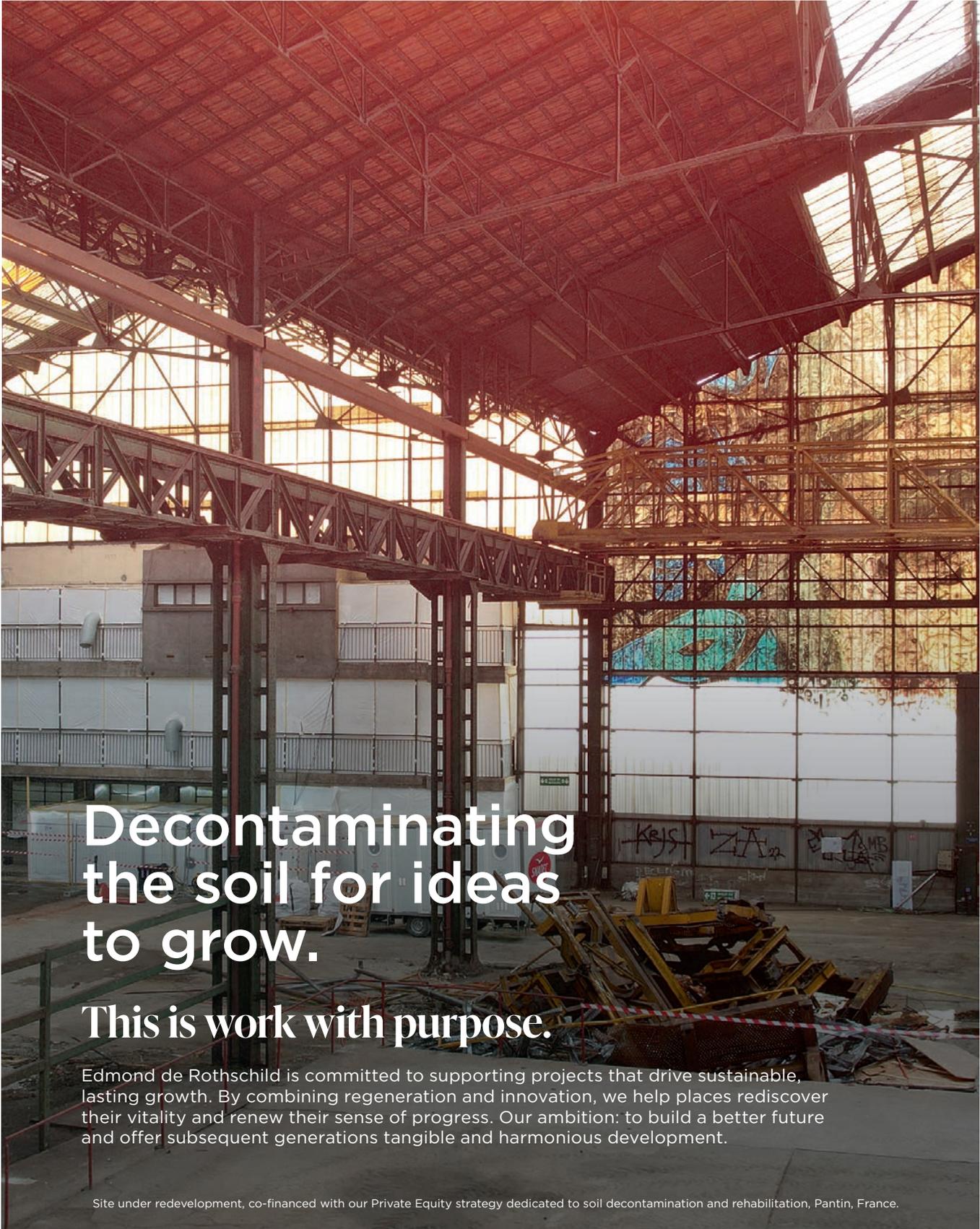
A second key challenge is the cross-border nature of private client matters. Many situations span jurisdictions, yet advice is often given in national silos. A Swiss entrepreneur with international assets requires coordinated thinking across legal systems.

We respond with strong in-house expertise and an international mindset from the outset, ensuring solutions remain robust.



**Dr. Jacob Bollag**  
Member of the  
Board of Directors  
**Dr. J. Bollag & Cie. AG**





# Decontaminating the soil for ideas to grow.

## This is work with purpose.

Edmond de Rothschild is committed to supporting projects that drive sustainable, lasting growth. By combining regeneration and innovation, we help places rediscover their vitality and renew their sense of progress. Our ambition: to build a better future and offer subsequent generations tangible and harmonious development.

Site under redevelopment, co-financed with our Private Equity strategy dedicated to soil decontamination and rehabilitation, Pantin, France.



**EDMOND  
DE ROTHSCHILD**

# Building ESG Excellence and Delivering Real-World Impact



## Edmond de Rothschild

### What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?

Our most impactful innovation has been making ESG and impact truly operational at scale – moving from commitment statements to repeatable, portfolio-by-portfolio investment discipline. This includes clearer frameworks, stronger governance, and better decision tools: for example, portfolio managers now use real-time dashboards that consolidate ESG scores, controversies, climate metrics (including direct/indirect and avoided emissions), biodiversity indicators, SDG exposure and regulatory indicators – strengthening both risk oversight and the quality of client conversations.

Across private assets, our infrastructure debt platform illustrates how we translate sustainability into concrete financing: €6.5+ billion deployed across 135+ investments in 21 European countries, with a meaningful share directed to the energy transition.

### How do you cultivate a culture that consistently drives excellence and high performance?

Internally, we often speak about “faire du Edmond”: high standards, ownership and long-term thinking – paired with an uncompromising focus on client outcomes. That culture is reinforced by how we organise ourselves: our new Geneva headquarters (inaugurated in 2024) was designed to bring 700 colleagues together and “break silos,” improving collaboration and collective energy in the service of clients.

We also invest in continuous learning and ethics: in 2024, employees received 10.1 hours of business ethics training on average, and 87% of the workforce was trained on compliance and business ethics topics.

### What role has collaboration - either internally or with external partners - played in your success?

Collaboration is a differentiator. Internally, the integration of teams and expertise – supported by common frameworks –

helps shorten time-to-solution and improve consistency across mandates. Our Geneva hub was explicitly conceived to support this, with leadership physically closer to teams to improve interaction and creativity for clients.

Externally, we partner where it matters most for clients – particularly in private markets. For example, within BRIDGE we combine investment expertise with dedicated ESG resources (including ESG officers and Group Sustainability support) to monitor assets and align with investor requirements.

### What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

*We see three major challenges:*

- trust and transparency as regulation and public scrutiny intensify.
- an “impact-proof” era where methodology, comparability and reporting credibility will be decisive; and
- the accelerating need for specialised talent across private assets, sustainability and risk.

Our response is to keep strengthening governance and reporting capabilities, and to invest in robust climate/biodiversity approaches and tools that help clients make informed, long-term decisions in a world shaped by geopolitical shocks, climate disruption and rapid regulatory change.

### What does winning this award mean to your firm, and how will you use this recognition going forward?

Winning two awards – one for ESG organisation and offering, and one for Impact – recognises sustained progress: building rigorous capabilities while delivering solutions that clients can trust. We will use this recognition as a benchmark and catalyst – deepening client dialogue, accelerating best-in-class sustainable solutions, and continuously raising the bar on transparency and measurable outcomes.

# EFG Private Banking

Where your financial  
ambitions *set the  
agenda.*

Experience distinctive client-centric service  
designed to turn your aspirations into reality.

We are delighted to have  
been named winner of  
“**Wealth Planning Team**” in the  
Wealth Briefing Swiss Awards 2026.



WEALTH BRIEFING **SWISS**  
**AWARDS 2026**

**WINNER**  
Wealth Planning Team

EFG Private Bank

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# Building Excellence in a Rapidly Evolving Wealth Landscape



**Evgenia Goti Koukoumaki**  
Global Head of Wealth Planning  
EFG Private Bank

## How do you cultivate a culture that consistently drives excellence and high performance?

At EFG, excellence and high performance are embedded in our vision, policies, and staff appraisal processes. We foster a culture that is agile, forward-thinking, and aligned with our five core values.

We are accountable, taking ownership of our responsibilities and always seeking continuous improvement. We are hands-on, proactive, and adaptable, delivering high-quality outcomes that reflect the dynamic nature of wealth. We are passionate, driven by our commitment to excellence and the evolving needs of our clients. We are solution-driven, focusing on fair client outcomes with a risk-aware mindset and an ability to anticipate change. Finally, we are partnership-oriented, valuing collaboration and teamwork while nurturing an entrepreneurial spirit.

Together, these values ensure EFG remains at the forefront of the industry and well positioned to guide clients in an increasingly complex environment.

## What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

Several forces will continue to shape wealth management at an accelerating pace, including geopolitical uncertainty, the Great Wealth Transfer, digitalisation, and rising regulatory requirements.

To address these challenges, EFG is investing in the right infrastructure for the future. We are strengthening our global control framework while expanding our investment management and advisory capabilities. We are also enhancing our Next Gen and family governance offerings, recognising that the transfer of wealth across generations and borders presents both risks and opportunities.

Alongside this, we are investing in secure digital systems designed to support – rather than replace – human judgement. Our objective is to seize emerging opportunities and help clients navigate the complexities of creating, protecting, and transferring wealth.

## What does winning this award mean to your firm, and how will you use this recognition going forward?

Winning this award is both an honour and a responsibility. It reinforces EFG's reputation as a leading Swiss private bank, recognised for our custody and investment management capabilities, client-centric approach, entrepreneurial model, and strong balance sheet.

More importantly, it validates our holistic expertise in wealth management and our ability to translate investment strategy and wealth planning into integrated advisory solutions. Internally, the award sets a benchmark for continued excellence. Externally, it supports our engagement with clients and partners as we remain innovative and responsive to industry change.

## Where do you draw inspiration for innovation – within the wealth industry or beyond it?

Our primary source of inspiration is our clients. Many are entrepreneurs with global lives and complex private and business wealth, who expect solutions that are cross-border, governance-led, portable, and adaptable.

To meet these expectations, we design distinctive wealth planning solutions that reflect regulatory, social, economic, and technological trends. Our collaborative approach draws on both in-house expertise and external specialists from within and beyond the wealth industry, ensuring our offerings remain relevant, forward-looking, and aligned with the evolving nature of wealth.





## A Legacy of Trust, A Future of Growth

Great investments don't just preserve wealth; they propel it forward.  
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Seefeldstrasse 287 8008 Zurich, Switzerland

# Investing. As It Should Be. Proven Across Real Markets. Trusted by Real Investors.

Founded in 2019, ELIA Investment Advisors AG delivers institutional-grade investment expertise to sophisticated investors. The firm bridges institutional asset management and private wealth management, combining rigorous investment discipline with a deep understanding of UHNW clients' needs. ELIA serves a select group of individuals, families, and professional clients with actively managed strategies across major liquid markets, tailoring solutions to client objectives while remaining fully independent.

ELIA's principle, "Investing. As It Should Be.", emphasises transparency, risk management, and intellectual independence. Using its Quantamental Methodology – a rigorous blend of fundamental and quantitative analysis – the firm earned the 'Best Fixed Income Strategy' award for its Fixed Income Opportunities Strategy (EUR/USD). Amid higher rates and market volatility, the strategy redefined fixed income, adopting a dynamic, risk-aware approach that delivered standout value in a challenging environment.

## **ELIA advocates risk targeting over traditional "conservative-balanced-aggressive" classifications. How is this philosophy applied within the Fixed Income Opportunities Strategy?**

Fixed income is perceived as something stable, with little price variations. Several episodes over the recent years, demonstrated that the fixed income markets can be more volatile than the equity markets. The impact of interest rates and credit spreads on fixed income performance is often underestimated, and the performance of fixed income in the post-Covid period has caught investors by surprise. Suddenly, the conventional approach of zero-interest-rate-policy for long, has switched to higher-inflation for longer, and this requires certain adjustments in the way investors should see fixed income.

Risk targeting is central to the strategy's design. Rather than relying on static labels, we start with a clearly defined risk objective and construct the portfolio accordingly. We need to offer to fixed income investors the security and yield stability they expect from deploying capital in such strategies. Low volatility and a reliable, well above-inflation rate of return, are critical requirements.

The utilisation of active risk mitigation strategies ensures that risk assumed is intentional, measurable, controllable and aligned with the goals a fixed income strategy should deliver.

## **In which ways do the Fixed Income Opportunities Strategy differ from conventional fixed income approaches?**

The key difference lies in investment rigor and execution agility. Fixed income markets are heavily influenced by macroeconomic forces, policy decisions, and liquidity dynamics. Our approach allows exposures to be adjusted as conditions evolve, while remaining anchored to a disciplined framework and clear risk parameters. This adaptive balance helps avoid rigid positioning in a rapidly changing environment.

## **How does the Fixed Income Opportunities Strategy help reinforce long-term trust with clients and investors?**

Trust is built through transparency, discipline, and consistency - particularly during challenging markets. Clients understand the strategy's objectives, its risk profile, and the rationale behind decisions. Last five years have been admittedly very challenging for fixed income investors, and we are glad to see that we emerged as winners, not only outperforming peers but also creating positive value for our investors. This alignment between philosophy, execution, and communication fosters confidence and supports durable, long-term relationships.



**Christos Kontos**  
Founding Partner & CEO  
**ELIA Investment Advisors AG**





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**eRI**

# From Legacy to Leading Edge: Where Human Expertise Meets Smart Technology

## How do you cultivate a culture that consistently drives excellence and high performance?

At ERI, we believe excellence starts with people. We foster a culture that encourages curiosity, continuous learning, and constructive feedback at every level. Welcoming new generations of talent who challenge established ways of working and question assumptions is a key driver of progress, helping us better align with our clients' strategic objectives. Anticipating change, understanding emerging trends, and investing in our teams, both in technology and industry expertise, are essential to staying relevant and delivering meaningful added value.

Our greatest satisfaction comes from delivering solutions that genuinely improve our clients' daily operations and long-term performance. This people-centric approach, supported by a robust and scalable platform, enables us to innovate with purpose and help banks deliver personalised services, launch new products, and adapt to regulatory constraints with confidence.

## What role has collaboration - either internally or with external partners - played in your success?

Collaboration with our clients and business partners is a cornerstone of our product strategy and a critical factor in our success. Through continuous dialogue and close cooperation, we exchange insights, challenges, and strategic objectives, enabling our teams of experts to address pain points specific to each financial institution and market. At the same time, we leverage global implementation experience and proven best practices to streamline operations, helping banks become more agile, efficient, and better equipped to evolve in a rapidly changing market.

## What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

AI is fundamentally reshaping how advice is created and scaled, and this transformation is still in its early stages. As demand rises for private equity and credit, structured solutions, and tokenised instruments, wealth managers are moving beyond traditional listed portfolios into more complex product ecosystems. While these offerings can improve diversification and return potential, they also bring challenges such as liquidity constraints, opaque valuations, suitability assessments, and increased operational complexity across onboarding, reporting, and compliance. Supporting them requires modernised product and operating models. At the same time, generational wealth transfer has made digital-first engagement, transparency, values-based investing, and seamless multi-channel access to advice essential to the value proposition.

Ultimately, successful innovation in this space depends on aligning product expansion with stronger risk disclosures, advanced portfolio analytics, and scalable distribution supported by effective client education. The OLYMPIC Banking System sits at the core of banks' operations, helping institutions build resilience while responding to the evolving demands of private banking and wealth management. Through automation, instant payments, cloud-based deployments, and system integration, private banks and wealth managers can optimise costs, strengthen risk mitigation, and operate with greater efficiency and control.

At the same time, the platform remains innovation-driven, enabling advanced digital capabilities without losing the human touch essential to trusted advisory relationships. The focus is on delivering frictionless digital experiences, scaled through real-time data. Firms are increasingly combining agentic collaboration, instant KYC, embedded finance, and dynamic credit within existing platforms to enable contextual services, faster decision-making, and new revenue streams.



**Kim Blikas**  
Regional Sales Manager  
ERI



# ERLEN

Independent Swiss Asset Manager since 1995

**Erlen Capital Management AG**  
Florastrasse 44, 8008 Zurich, Switzerland

Telephone: +41 44 267 99 47  
info@erlencapital.com, www.erlencapital.com

# Erlen Capital Management AG: Building on Independence Through Innovation and Responsibility



**Bruno Schneller**  
Managing Partner  
**Erlen Capital**  
**Management AG**

Since 1995, Erlen Capital Management AG has combined independence with a long-term, client-focused approach to wealth management. Based in Zurich, the firm specialises in discretionary portfolio management and advisory services for private clients, families and institutions. Its philosophy is rooted in transparency, disciplined investment processes and a clear alignment of interests with clients.

**What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?**

Over the past year, our most impactful innovation has been the further refinement of our investment and decision-making framework. Rather than pursuing technology for its own sake, we focused on improving portfolio construction, risk monitoring and internal collaboration.

Enhanced analytical tools and clearer governance structures have allowed us to respond more decisively in volatile markets while maintaining consistency in execution. For clients, this has translated into greater transparency, faster decision-making and portfolios that remain aligned with long-term objectives even during periods of uncertainty.

**What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?**

The wealth management industry is entering a phase of profound change. Increasing regulation, growing complexity of financial markets and rising client expectations for transparency and personalisation will challenge traditional models. At the same time, technological advances – particularly data-driven analysis and artificial intelligence – will reshape how investment decisions are prepared and communicated.

We are positioning Erlen Capital to meet these challenges by remaining deliberately

independent, investing selectively in technology, and strengthening the human element of advice. Our focus remains on thoughtful portfolio management supported by experience, judgement and accountability.

**What role has collaboration – either internally or with external partners – played in your success?**

Collaboration is a central pillar of our culture. Internally, close team cooperation ensures that different perspectives are considered before decisions are made. This collective approach reduces key-person risk and strengthens consistency across portfolios.

Externally, we work with a carefully selected network of partners and service providers who share our standards of quality and independence. These relationships allow us to access best-in-class research and infrastructure while retaining full control over investment decisions.

**What does winning this award mean to your firm, and how will you use this recognition going forward?**

Winning this award again is a strong endorsement of our approach and, above all, of our team. We see it not as a destination, but as a responsibility. The recognition reinforces our commitment to disciplined investing, continuous improvement and putting clients' interests first.

Going forward, we will use this visibility to further strengthen trust with existing clients, attract like-minded professionals and continue refining our offering. Our ambition is not rapid growth, but sustainable excellence.

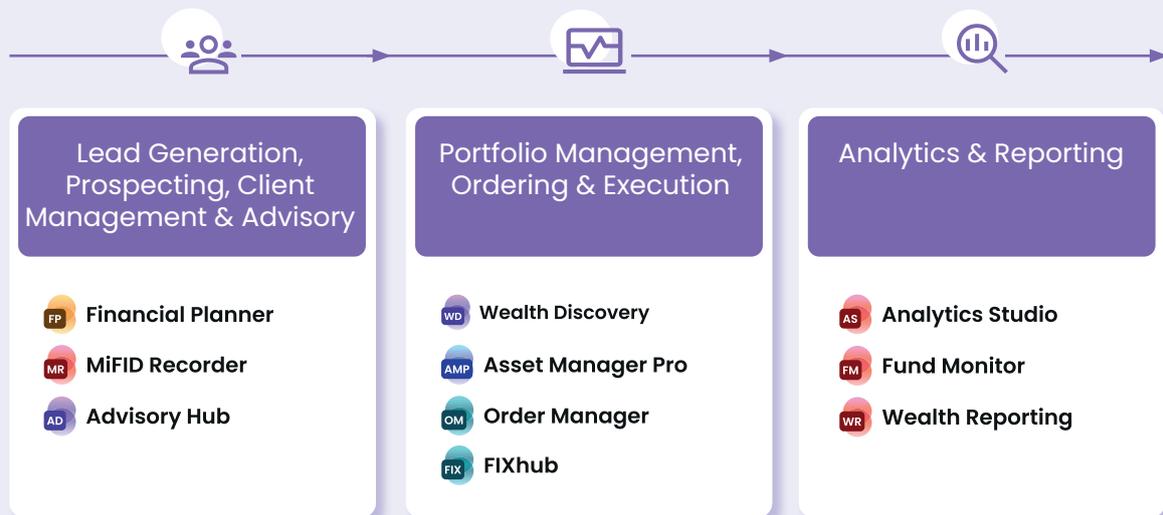
In an environment that rewards short-term trends, Erlen Capital Management AG remains committed to long-term thinking – combining independence, innovation and responsibility to serve clients across generations.





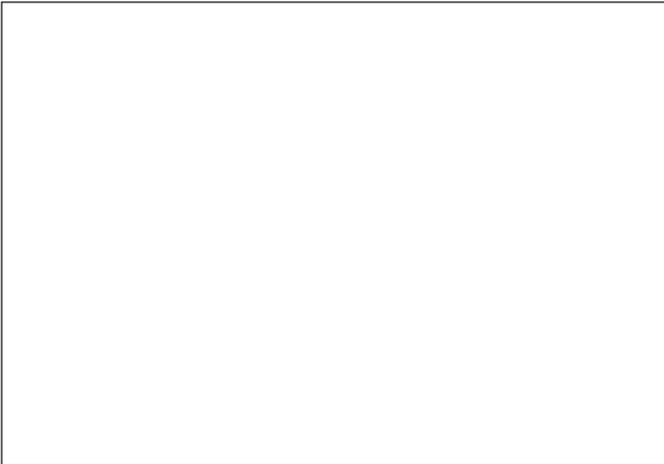
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**Etops Group**



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# Turn Complexity into Precision.

Deliver exceptional digital client experiences with FactSet's integrated platform. Leverage institutional-grade portfolio analytics, unified multi-asset class research, and real-time global market insights to empower advisors and delight clients.

Our open, flexible technology adapts to your needs—whether through workstations, CRM integrations, client portals, or standalone applications.

**Drive growth. Modernize workflows. Build stronger relationships.**

[www.factset.com/wealth](http://www.factset.com/wealth)



# FactSet: Powering Data Excellence & Scalable Innovation for Wealth Management



## What has been the most impactful innovation FactSet introduced recently and how has it shaped client outcomes?

One of our most significant advancements is the expansion of our open, cloud-enabled delivery of real-time data. Firms can access harmonised and permissioned data, analytics, and content through APIs and feeds that integrate seamlessly into advisor desktops, client portals, CRMs, and proprietary tools.

This innovation gives wealth managers a single, reliable source of truth across the enterprise. Advisors gain faster access to relevant insights, home offices benefit from improved governance and consistency, and digital teams can accelerate development cycles for client-facing experiences.

## Can you share an example that illustrates your commitment to client service or problem solving?

A recent engagement with a major private bank highlights our partnership approach. The client sought to consolidate fragmented data sources, modernise advisor workflows, and improve client reporting. FactSet deployed a coordinated team across data integration, content engineering, and workflow specialists to streamline custodial data ingestion, harmonise classifications, and establish new peer groups and benchmarks for the bank's cross-border book of business.

Using best practice onboarding, we reduced deployment risk, accelerated time to value, and enabled advisors to deliver more consistent, informed client conversations. This collaborative model, blending deep data expertise with practical workflow design, remains a core differentiator for our clients.

## What are the key challenges you foresee in wealth management over the next five years, and how is FactSet positioning to meet them?

We see three major challenges in the years ahead: increasing demand for personalisation, higher regulatory expectations, and the need to scale digital experiences without creating additional operational complexity. FactSet is addressing these pressures by expanding transparent and well-governed data, strengthening AI-driven quality control processes, and enabling firms to define custom taxonomies, benchmarks, and peer groups.

Our unified data platform and workflow tools help wealth firms maintain regulatory rigor, support cross-functional alignment, and deliver more relevant insights at scale. These capabilities will be essential as the market becomes more competitive and more personalised.

## What does winning this award mean to your firm?

Winning this award highlights the importance of high-quality, transparent data as the foundation of modern wealth management. For FactSet, it reinforces our commitment to being a strategic partner that helps firms deliver smarter investment decisions, operational efficiency, and differentiated client experiences.

FactSet



## For readers who may not know you, what does FactSet do as a business?

FactSet delivers open, flexible access to high-quality data, analytics, and technology to more than 220,000 global users across the buy side and sell side. Within wealth management, we support private banks, RIAs, and multi-family offices. Our integrated platform spans advisor and home office workflows, including market and portfolio monitoring, model management, compliance, proposal generation, and client reporting.

Our unified data model combines more than 30 proprietary and third-party datasets covering global equities, fixed income, funds, ETFs, private markets, and alternatives, along with exchange data and proprietary and third-party news, ensuring consistent and transparent information across systems and channels. Advisors benefit from consolidated portfolio analytics, multi-asset research, and real-time insights through the Advisor Dashboard, while home office and digital teams can access the same data on the platform or through APIs, data feeds, and cloud-native delivery. With the ability to combine our proprietary and third-party data with our clients' own research, FactSet ensures the firm's best ideas reach advisors and relationship managers at the right time.

# GOLDBACH CAPITAL

Access leading private market opportunities

We specialize in private market solutions and provide access to the best deals to achieve exceptional performance



WINNER

*Private Market Investment Specialist*

**Goldbach Capital**

**GOLDBACH CAPITAL AG**

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goldbachcapital.com



# Finding Opportunity Before it Becomes Consensus



## Goldbach Capital

### What differentiates Goldbach Capital's approach to private market investments?

At our core, we are committed to investing our own capital and time alongside our clients. This alignment of interests is fundamental: our success is directly linked to theirs, and every strategy we pursue reflects that shared outcome. We combine institutional-grade discipline with entrepreneurial agility, curating highly selective opportunities across private equity, private credit, and special situations. Rather than offering generic access, we focus on areas where inefficiencies, complexity, or emerging structures may create compelling risk-adjusted returns. Each investment is underpinned by deep due diligence, conservative structuring, and a clear understanding of downside risk as well as long-term value creation.

### How does your firm operate at the frontier of private markets rather than following established trends?

Operating at the frontier of private markets requires intentional exploration rather than passive participation. Our approach focuses on identifying emerging industries, evolving business models, and new ways of deploying capital before they become institutional consensus. We map structural shifts, such as regulatory change, technology adoption, or capital formation, that create opportunities beyond traditional private equity. This often leads to less intermediated transactions, founder-led businesses, specialised operating partnerships, and innovative structures where competition is limited and pricing more rational.

### How do your investment structures support this approach?

Our alternative investment platform is intentionally flexible and comprehensive:

- Direct Investments are our preferred approach whenever possible. By investing directly into specific private companies or real estate assets, we gain greater control and influence, access exclusive

opportunities, and ensure stronger alignment of interests for our clients.

- Pooled Investments involve creating tailored vehicles that combine multiple investments into a single structure. These solutions pool capital from several investors to acquire stakes in private companies, offering exposure to both mature businesses and earlier-stage opportunities.
- Fund Investments provide access to established managers and diversified private market portfolios that may otherwise be inaccessible. While this approach offers scale and diversification, it also involves higher fees and less control – factors we carefully weigh when selecting such strategies.

### Why is Goldbach Capital particularly well positioned to serve sophisticated private and institutional investors, and how do you manage risk while pursuing innovation?

Innovation without discipline is speculation. Risk management is embedded at every stage of our process – from initial screening and structuring to active post-investment oversight. We prioritize capital protection, alignment with experienced operators, and robust legal and economic safeguards. This disciplined framework allows clients to participate in the evolution of private markets while maintaining resilience across market cycles.

### What this recognition means for us

This award reflects the collective commitment of the people behind Goldbach Capital. We thank our partners for their strategic leadership, our asset managers for their rigor and disciplined execution, our private clients and compliance team for translating complexity into clarity, and our supporting teams for ensuring excellence at every stage. Their collaborative mindset, entrepreneurial spirit, and forward-looking approach are the true foundation of this recognition and of our continued progress in private markets.

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“Luck shouldn’t  
be part of your  
portfolio.”

**HYPOSWISS**  
A D V I S O R S

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Expect the expected

Rue Bovy-Lysberg 10, 1204 Geneva – Switzerland  
Tel. +41 22 310 76 40, [www.hyposwissadvisors.ch](http://www.hyposwissadvisors.ch)

# HYPOSWISS ADVISORS: Elevating Excellence in Wealth Management



## Hyposwiss Advisors SA

In the competitive landscape of wealth management, HYPOSWISS ADVISORS has continued to build on its strong foundation of personalised service, deep client relationships, and performance orientation. Over the past year, we have not only maintained these core principles but elevated them through a renewed focus on collaboration, talent development, and strategic foresight, earning us the *WealthBriefing Swiss Award 2026* for 'Independent Asset Manager (CHF 500 million – 1 billion AuM)'.

Our team remains the cornerstone of our success. Each member brings unique expertise and a shared commitment to excellence, fostering a culture where integrity and entrepreneurial spirit thrive. We have strengthened our leadership and continuously focus on innovation, empowering individuals to challenge the status quo and contribute ideas that enhance client outcomes. This evolution reflects our belief that excellence begins with people and that investing in our team translates directly into superior client experiences.

Collaboration has also played a pivotal role in our progress. Internally, we have deepened cross-functional cooperation to deliver holistic solutions tailored to each client's goals. Externally, we have expanded our network of trusted partners, including leading legal, tax, and investment specialists worldwide. These alliances enable us to address complex, multi-jurisdictional challenges with agility and precision, ensuring that our clients benefit from seamless, forward-thinking strategies.

Looking ahead, we recognise the challenges shaping the next five years: regulatory complexity, technological disruption, and evolving client expectations. Our response is proactive, strengthening compliance frameworks, integrating sustainability into our advisory processes, and maintaining the personalised service that defines our brand. By anticipating these shifts, we position ourselves not only to adapt but to lead in an industry undergoing profound transformation.

Receiving this award is more than a milestone; it is a catalyst for future growth. It validates our commitment to excellence and client-centricity, while inspiring us to aim even higher. We will leverage this recognition to enhance our visibility, attract top talent, and deepen partnerships that share our vision. At HYPOSWISS ADVISORS, excellence is not a destination, it is a continuous journey, and this achievement marks the beginning of an even more ambitious chapter.

Shaping the Future of Wealth Management  
with Swiss Precision.



*Winner*

• **Independent Asset Manager with Assets  
Between CHF 500 Million - CHF 1 Billion AuM**

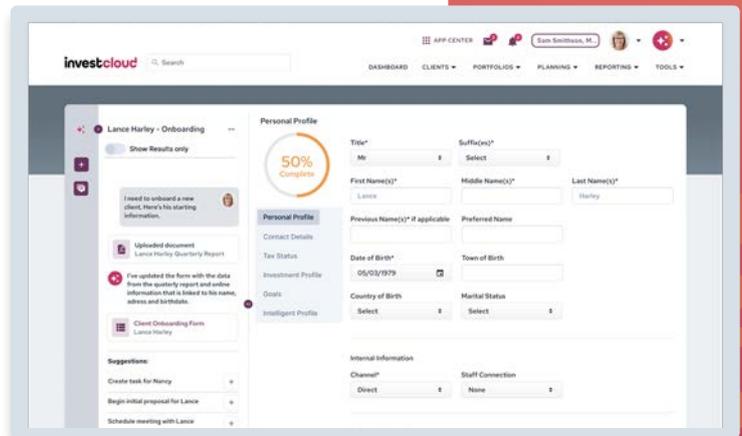


# Creating a Smarter Financial Future

From onboarding to advice, turning insight into action at scale.

Proud to be named winner of **Best Onboarding Solution** at the 2026 WealthBriefing Swiss Awards

InvestCloud is transforming the adviser-client relationship by combining data and agentic AI to turn insights into actions that lead to smarter client outcomes.



See how InvestCloud can help your firm realize a smarter financial future at [InvestCloud.com](https://InvestCloud.com)

## #WealthConnected



InvestCloud is proud to be recognised by WealthBriefing Swiss Awards for Best Onboarding Solution two years in a row.

# Transforming Client Outcomes with AI-Powered Intelligent Wealth Solutions

## What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?

Our most impactful recent innovation is the rollout of our AI-powered Intelligent Wealth Solutions suite, which we began introducing in summer 2025 and continue to expand today. These intelligent applications, from Intelligent Screening and Intelligent Meeting to our emerging agentic wealth ecosystem, sit on top of a unified wealth data model and embed AI directly into the advisor workflow.

They are helping firms and advisors automate due diligence and meeting preparation, reduce operational risk and manual effort, and surface proactive, personalised next best actions across each book of business. The result is better outcomes for our clients and for their investors, who experience faster onboarding, more relevant advice and stronger, more consistent engagement at every stage of their wealth journey.

## What role has collaboration – either internally or with external partners – played in your success?

Collaboration is at the heart of how we innovate. Rather than trying to build everything ourselves, we intentionally partner with best-of-breed specialists and integrate them deeply into our platform.

Our work with smartKYC brings AI driven, multilingual KYC screening and ongoing risk monitoring directly into Intelligent Screening, helping firms onboard complex, cross-border clients more efficiently and confidently. In parallel, our partnership with Zocks powers Intelligent Meeting, a privacy first AI assistant that automates meeting preparation, notetaking and follow-up without requiring call recording.

Together, these and other partnerships allow us to deliver fully integrated, best-in-class capabilities to clients globally, without compromising on compliance, data privacy or user experience.

## What are the key challenges you foresee in wealth management over the next five years and how are you positioning your business to meet them?

Over the next five years, every part of wealth management will be reshaped by AI – from prospecting and onboarding to portfolio management, servicing and reporting. The biggest challenge for firms will be turning fragmented data and point solutions into a coherent AI strategy that is safe, compliant and genuinely useful.

At InvestCloud, we are building an integrated Intelligent Wealth ecosystem that combines a unified wealth data platform with agentic AI powered solutions that work across the wealth lifecycle. This system is designed to augment, not replace, human advisors – automating routine workflows, surfacing insights and recommended actions, and orchestrating execution with the advisor firmly in control.

The real risk is not AI itself but failing to adopt it thoughtfully. Firms and advisors who delay adopting an AI strategy will struggle to compete, so we are helping clients educate teams, embed governance and get hands on with AI in a practical, trusted way now – before the adoption gap becomes a performance gap.

## What does winning this award mean to your firm, and how will you use this recognition going forward?

Winning this *WealthBriefing* award is a powerful endorsement of our strategy and execution. *WealthBriefing* is a highly respected, independent voice in global wealth management, and its recognition validates our commitment to delivering best-in-class, AI powered solutions that help clients overcome complexity and accelerate growth.

We will use this award to deepen trust with existing clients, open new conversations in key international markets, and continue attracting top talent and partners who share our vision of enabling smarter financial futures for investors worldwide.



**Christine Ciriani**  
President  
InvestCloud



Since 1993, we've been turning the most demanding financial challenges into **tailor-made** client solutions.

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- > Securitization
- > Structured Products
- > Global Fixed Income
- > Digital Assets
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# ISP Securities: Pioneering Tailored Asset Solutions from Traditional Securities to Digital Innovation



**Julia Hauser**  
Head of Paying Agent Services  
**ISP Securities Ltd.**



ISP Securities Ltd. ("ISP") is a Swiss privately-owned investment boutique headquartered in Zurich, with its founding roots dating back to 1993. ISP is a licensed securities firm in Switzerland, supervised by FINMA, with fully regulated offices in Israel, Hong Kong, and Dubai. With 90+ finance professionals, ISP specialises in Asset Solutions – with securitisation and Paying Agent Services at the core – alongside Digital Assets, Investment Management, and Global Markets.

## What recent innovation has had the greatest impact on your clients or internal efficiency?

ISP has a long-standing track record of innovation in fixed income trading, structured products (AMCs, CLNs/Bonds, Trackers, and ETPs), and the development of modern Paying Agent and Listing Agent services. Most recently, we responded to the growing demand from asset managers for a fully integrated digital assets platform. We now offer crypto custody, trading, staking, chain analysis, payments, and securitisation of underlying crypto assets. The latest addition is the tokenisation of virtually any asset class. Another example is our Sharia-compliant AMCs.

## Can you share an example of your team's commitment to client service or problem solving?

We securitise even the most exotic non-bankable assets. This means that we regularly receive and fulfill our clients' requests for highly tailored securities, at a reasonable price and under strict timelines. The best example for such an exotic product is an AMC for a Belgian stable of show jumping horses. There is no template term sheet for such a product. We deployed extensive in-house expertise and took the time required for the due diligence, compliance, structuring and maintenance of this innovative security. We always go the extra mile to tailor solutions for our clients – every day.

## What role has collaboration played in your success?

Collaboration is key to our success. We form a team with our clients, acting as a trusted sparring partner from concept to execution, with full lifecycle management of the structured products thereafter.

Internally, our one-stop-shop model is powered by close collaboration across in-house experts, covering onboarding, structuring, regulatory compliance, and ongoing maintenance.

Externally, we leverage a strong partner ecosystem in 12 jurisdictions – across securitisation platforms, reporting, and management tools – and we maintain active connectivity with more than 700 brokers and financial institutions worldwide, to enhance efficiency and scalability. In digital assets in particular, transparent collaboration with specialised partners is essential to delivering a comprehensive and resilient client solution. ISP also supports banks in structuring and issuing in-house products that can be efficiently transferred off their balance sheets.

## What does winning this award mean to your firm going forward?

The Paying Agent team is central to our business. What we internally refer to as Paying Agent 2.0, goes far beyond the traditional administration of subscriptions, coupons, and dividends. It is the backbone of an innovative and cost-effective securitisation offering, now also extending into its digital asset forms. The recognition is highly rewarding for our team, and we will use it to share our expertise and highlight the critical role of the Paying Agent in international capital markets.





**WINNER: Etopos Group**



**WINNER: Goldbach Capital**



**WINNER: Hyposwiss Advisors SA**



**WINNER: Indosuez Wealth Management**



**WINNER: InvestCloud**



**WINNER: ISP Securities Ltd.**

# ITERAM

**UNCONVENTIONAL  
THINKING.**

**YOUR TRUSTED PARTNER FOR ALTERNATIVE INVESTMENTS**

**HEDGE FUNDS | PRIVATE DEBT | VENTURE CAPITAL**

# Driving Innovation and Excellence in Alternative Investments

**I**TERAM is an alternative asset manager regulated and authorised by FINMA, specialising in alternative fund selection and management, private markets investments, and in asset-backed alternative lending. Our team's expertise, research, and investment acumen are dedicated to building a specialised investment management organisation focused on performance and innovative alternative solutions. We serve as the investment manager for several Luxembourg and Cayman-based funds and provide bespoke alternative investment solutions and research services to professional and institutional clients. Our ability to adapt to market shifts, combined with our deep market insights, has helped us maintain a competitive edge over the years.

## What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?

One of the most impactful innovations we have introduced recently has been the further institutionalisation of our investment and monitoring framework across alternative strategies. This includes enhanced data-driven analysis, more granular risk attribution, and strengthened portfolio management processes.

By combining advanced analytical tools with experienced human oversight, we have been able to improve decision-making efficiency while maintaining a high level of conviction in our allocations. For clients, this has translated into more resilient portfolios, clearer reporting, and greater transparency, particularly during periods of market volatility.

## How do you cultivate a culture that consistently drives excellence and high performance?

At ITERAM, excellence is driven by a culture of accountability, intellectual curiosity, and long-term thinking. We encourage open debate and independent thinking across the team, ensuring that investment

decisions are thoroughly challenged and well-supported. Continuous learning is central to our culture, with team members expected to stay closely engaged with market developments and evolving alternative investment trends.

Just as importantly, alignment of interests and a strong sense of collective responsibility help ensure that high performance is sustainable and consistently aligned with client objectives.

## What role has collaboration – either internally or with external partners – played in your success?

Collaboration is a cornerstone of our operating model. Internally, close cooperation between investment, risk, and operational teams allows us to maintain institutional standards while remaining agile. Externally, we work closely with a global network of specialist fund managers, service providers, and advisors.

These partnerships provide valuable insights into niche strategies and local markets, enhancing our ability to source differentiated opportunities. This collaborative ecosystem strengthens our investment process and allows us to deliver tailored solutions to our clients.

## What does winning this award mean to your firm, and how will you use this recognition going forward?

Winning this award is a strong endorsement of ITERAM Capital's investment approach, governance standards, and team commitment. It reinforces our credibility in a highly competitive alternatives landscape and recognises the consistency of our work overtime. We view this recognition not as an endpoint, but as motivation to continue raising our standards.

Going forward, the award will support our ongoing dialogue with clients and partners, while reinforcing our commitment to delivering innovative, high-quality alternative investment solutions.



**Manuel Garzelli**  
CEO  
ITERAM Capital



# Kiavila Avocats

[www.kiavila-avocats.com](http://www.kiavila-avocats.com)

Full Swiss  
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WINNER  
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WINNER  
Private Client Lawyer  
Carmen Kiavila - Kiavila Avocats



WINNER  
Most Promising New Entrant  
Kiavila Avocats

# Supporting Families and Private Clients Through Legal Precision, Trust and Innovation



**Carmen Kiavila - Founder**  
**Kiavila Avocats**

## What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?

Our most impactful innovation has been the introduction of a governance and ethics framework for the responsible use of artificial intelligence in wealth and private client matters. Given the importance of trust, confidentiality, and professional secrecy, we chose a controlled and compliant approach aligned with Swiss standards, strict data protection, and mandatory human oversight. We do not allow AI to use client data for training.

This has improved internal efficiency, particularly in research, while preserving the bespoke nature of our advice. For clients, it results in faster and more anticipatory guidance without compromising discretion. We have also strengthened niche expertise in cybersecurity law, crypto-related wealth, and cross-border tax structuring, which are increasingly central to modern wealth protection.

## How do you cultivate a culture that consistently drives excellence and high performance?

At Kiavila Avocats, excellence combines technical expertise with judgment, consistency, and discretion. We foster this through continuous training, clear priorities, and a long-term approach to talent development.

Our team is encouraged to adopt a consulting mindset, developing a deeper understanding of clients' broader objectives. I place strong emphasis on clarity, regular communication, and transparency, particularly regarding strategy and financial stability of the cases.

## Can you share a story that best illustrates your team's commitment to client service or problem solving?

We regularly assist internationally mobile clients facing urgent, complex tax and regulatory risks. In one case, a client missed a deadline to challenge a seven-figure tax assessment. Our team prepared and filed an appeal within a day and succeeded.

Beyond the immediate issue, we identified reputational risks,

including potential registration in the Swiss Debt Enforcement Register, which could have harmed the client's business credibility. Clients consistently value both our technical precision and the reassurance we provide.

## What role has collaboration – either internally or with external partners – played in your success?

Internally, we operate through close collaboration between tax, legal, and technology specialists. Externally, we work with private banks, fiduciaries, auditors, family offices, and IT security experts to deliver integrated, holistic solutions.

## What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

Key challenges include generational wealth transition and rising cybersecurity and digital risks. Younger clients expect strategic, values-driven guidance, while digitalisation requires legal advice that integrates governance, data protection, and technology risk. Our practice sits at this intersection.

## How do you identify and develop future leaders within your organisation?

Future leaders are identified through responsibility, engagement, and strategic involvement beyond case work. Leadership is assessed on judgment, discretion, and client sensitivity, with gradual exposure to complex mandates and firm-wide initiatives.

## What does winning this award mean to your firm, and how will you use this recognition going forward?

This award validates our modern, ethical approach to wealth advisory within the Swiss legal framework. It strengthens our positioning with international clients, supports talent attraction, and reinforces our investment in governance, technology risk, and cross-border structuring. Having previously won, in 2024, 'Most promising new entrant' award, this recognition is particularly meaningful.



# Resilient progress.

In a world of constant change, we provide stability and help preserve wealth across generations. Grounded in Swiss values and global market expertise, we guide our clients through complex financial decisions, for a legacy that endures.

# Resilient Progress

**L**akefield Partners AG is a leading independent Swiss asset manager, distinguished by a proven proprietary quantitative investment philosophy. Founded in 2012 and directly supervised by FINMA, the firm delivers investment solutions to private and institutional clients. Its disciplined approach and consistent long-term performance have earned repeated recognition through prestigious industry awards, reinforcing enduring client trust.

## What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?

*Vinicio Marsiaj:* One of our most impactful recent developments last year has been the launch of three Lakefield equity funds, which make long-established investment strategies available in a fund format. These strategies have been successfully applied in discretionary mandates over many years and are rooted in our data-driven, dynamic, and disciplined investment approach. By translating proven concepts into scalable fund structures, we have expanded client access to our core expertise, providing investors with institutional-grade strategies in a transparent, regulated, and efficiently implemented format while ensuring consistency across mandates and products.

## How do you cultivate a culture that consistently drives excellence and high performance?

*Bilal Jusufi:* We cultivate a culture of excellence and high performance by living our core values in our day-to-day work. Firstly, integrity and clarity form the foundation of our actions: we stand by our word, act transparently, and build trust, even in challenging times. Secondly, independence is a core value that allows us to focus consistently on long-term objectives, while lastly, a commitment to continuous growth ensures we continuously refine our thinking in pursuit of stronger outcomes. Earning and maintaining our clients' trust is what ultimately drives our commitment to excellence.

## What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

*Vinicio Marsiaj:* We believe that continuous change will remain a defining feature of wealth management in the years ahead, bringing ongoing market volatility, increasing complexity, and evolving regulatory and client expectations. Navigating this environment requires clarity, discipline, resilience, and a strong long-term perspective. We are positioning our business by remaining independent in our decision-making, building on proven concepts developed and refined over decades, and staying closely aligned with our clients' long-term goals. By combining quantitative discipline with adaptability, we aim to offer stability and direction in an increasingly complex investment landscape. Through this approach, we aim to provide resilient progress in a dynamic environment.

## What does winning this award mean to your firm, and how will you use this recognition going forward?

*Bilal Jusufi:* Winning this award is a strong recognition of our team's work and the trust our clients place in us. It reflects the quality of our investment philosophy and our expertise in asset management, rooted in a data-driven, dynamic, and disciplined investment approach. Beyond acknowledging achievements, the award reinforces our responsibility to uphold high standards and continuously improve. This recognition encourages us to continue delivering added value for the long-term benefit of our clients and to further strengthen our position as a trusted partner in navigating complex markets.



**Vinicio Marsiaj - Partner**  
**Bilal Jusufi - Partner**  
**Lakefield Partners AG**



# stability.



Today, the world is out of balance. What were once certainties are now liabilities. Globalisation has turned from opportunity to vulnerability.

In a volatile era, we all crave stability.

But when others slow down and dig in, we find balance through movement.

At Lombard Odier we've spent two centuries readjusting, realigning and rethinking for our clients.

For we know in times of chaos, stability is not static. It is constantly created. By rethinking. Everything.

Discover the power of rethinking at [LombardOdier.com](https://www.LombardOdier.com)

rethink everything.®



**LOMBARD ODIER**  
LOMBARD ODIER DARIER HENTSCH

PRIVATE BANKING  
ASSET MANAGEMENT  
TECHNOLOGY



# Lombard Odier: at the Forefront of Banking Technology



**Geoffroy De Ridder**  
Head of Technology & Operations  
**Lombard Odier**



***“At Lombard Odier, we aspire to be the bank of choice for private and institutional clients seeking a tailored, sustainable approach to wealth and asset management”.***

**What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?**

The latest version of My LO - our flagship e-banking platform available on smartphone, tablet or desktop - introduces a new era of personalisation, intuitive design and investment insights. Designed around our clients’ evolving needs, My LO empowers users to manage their wealth with confidence, clarity and convenience.

Through intuitive navigation and visual design, with new features such as a portfolio explorer, enhanced position details, personalised investment advice in-app and a full suite of secure digital banking services, we are redefining the user experience by offering cutting-edge solutions to our private clients.

To further elevate our digital capabilities and client experience, we continue to embrace new technologies with the introduction of AI capabilities in our engineering and development. The adoption of advanced AI delivers substantial advantages, providing more robust and reliable technology solutions that indirectly enhance service delivery.

**What role has collaboration – either internally or with external partners – played in your success?**

Collaboration has been a cornerstone of Lombard Odier’s success. Internally, our technology and business teams work in close partnership to ensure that innovation is seamlessly aligned with client needs and operational excellence. This integrated approach has

enabled us to design and continuously enhance our proprietary platforms such as G2/GX and My LO, delivering solutions that combine technological sophistication with a client-centric perspective.

Externally, we have cultivated strategic relationships with private banks and EAMs (External Asset Managers) through our ITO/BPO offering. By sharing our expertise and technology, we are strengthening our ecosystem and raising our standards. These collaborations foster mutual growth and innovation, reinforcing our commitment to shaping the future of banking technology.

**What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?**

Clients increasingly seek bespoke financial strategies tailored to their goals, values, and circumstances. Wealth managers are using data-driven insights and AI to deliver personalised advice, while digital expectations are rising across onboarding and portfolio management. Lombard Odier’s G2 platform, rebuilt through the GX programme, now offers a modern, scalable solution ready to meet evolving client needs and shape the future of wealth management.

**What does winning this award mean to your firm, and how will you use this recognition going forward?**

We are very proud to receive this award! This distinction acknowledges the expertise and dedication of our technology and business teams in developing and advancing our proprietary platforms. It also underscores the strategic decisions that have allowed us to maintain a competitive edge and consolidate our position at the forefront of banking technology.

Going forward, we will harness this achievement to reinforce our position as a trusted partner for private and institutional clients and use it as a springboard to keep pushing boundaries in delivering bespoke solutions that respond to our clients’ ever-evolving needs.



# Introducing Mastro Intelligence

Mastro Intelligence is a secure AI layer embedded in the leading platform for UHNW wealth management.

Purpose built for SFOs, MFOs, UHNW-focused RIAs, and institutions, it delivers faster answers, deeper insight, and elevated client service- without new systems to learn. By automating document intake, normalizing alternative investments, and enabling conversational analysis across portfolios, your team spends time protecting and growing wealth, not wrangling data.



With Mastro Intelligence, now you can:

- ▶ Deliver boutique service without the busywork
- ▶ Defend decisions with precise, consolidated data (including alts)
- ▶ Stop chasing documents, start serving clients
- ▶ Generate reports with simple prompts
- ▶ Protect margins as you scale

Visit: [www.mastro.com/ai](http://www.mastro.com/ai) to learn more

# Reducing Complexity, Increasing Trust: Masttro's Vision for the Next Era of Wealth Tech



**Jay McNamara**  
CEO  
**Masttro**

## What recent innovation has had the greatest impact on client outcomes or internal efficiency?

Our most impactful recent innovation is Masttro Intelligence - a secure AI layer embedded within the Masttro platform that turns complex wealth data into actionable intelligence, without introducing new systems or compromising governance.

For family offices, this is simple: it collapses the distance between data and decisions. Historically, wealth teams have had to piece together answers across spreadsheets, emails, PDFs, custodian portals, and multiple administrators, then reconcile, validate, and translate that into something decision ready. Masttro Intelligence changes the operating model by making the platform where questions are answered, exceptions surfaced, and work gets done, with speed, context, and control.

At our scale - processing 8M+ transactions daily across 10,000+ end-client users - we're not just improving one firm's workflow; we're helping raise efficiency across the wealth management industry by standardising how data is captured, validated, and translated into decision-ready reporting.

## What does winning this award mean to your firm, and how will you use this recognition going forward?

Winning the awards for Most Innovative Use of AI and Overall Technology Solution is a meaningful validation of our team's daily focus and our broader mission to be the leading technology solution for modern UHNW wealth management.

In a region where cross-border complexity and data fragmentation are common, this recognition reinforces that we are solving problems that matter, with innovation that is practical and trusted.

We'll use this recognition in two ways: externally, to build confidence with family offices, RIAs, and institutions evaluating modern platforms; and internally, as a

rallying point that reinforces our culture of excellence and momentum as we continue to expand Masttro's reach and capabilities.

## What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

Three forces will shape the next five years. First, the Great Wealth Transfer will reset expectations around experience, transparency, and client engagement. Second, there will be an accelerating move away from legacy tools and spreadsheets, with less tolerance for fragile, stitched-together stacks that create operational risk. Third, data privacy, cybersecurity, and vendor governance will become even more central as firms and wealth owners demand stronger control over sensitive information.

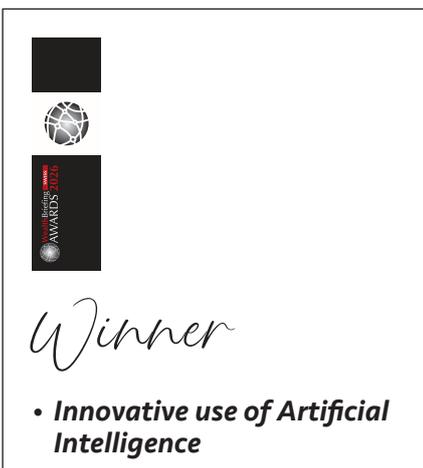
We're positioning Masttro around a simple principle: reducing complexity and increasing trust. That means delivering a unified view across fragmented sources and using Masttro Intelligence to help teams move from searching for information to acting on it - securely, contextually, and at institutional standards.

## How do you cultivate a culture that consistently drives excellence and high performance?

We often refer to "the Masttro difference," which comes from combining deep domain expertise with a relentless focus on innovation and execution.

We set a high bar for quality because our clients, family offices, RIAs, and institutions depend on precision and trust. That standard is reinforced through close collaboration across product, engineering, and client-facing teams, ensuring what we build is grounded in real workflows and needs.

Cybersecurity and data governance are embedded into how we operate as a core part of earning trust. Ultimately, high performance is driven by a clear mission: delivering better data, showcased beautifully, so clients can make confident decisions.



The background of the top half of the image is a teal-tinted aerial view of a city skyline, likely Dubai, with numerous skyscrapers and a winding road. Overlaid on this is a large, stylized 'OG' logo where the 'O' is white and the 'G' is green. Below the logo, the word 'OPTIONS' is written in large white capital letters, and 'GROUP' is written in smaller green capital letters below it.

OG  
OPTIONS  
GROUP



**Wealth**Briefing **SWISS**  
**AWARDS 2026**

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**WINNER**

*Wealth Management Executive Search Firm*

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**Options Group**

# Building Future-Ready Leadership in a Changing Wealth Landscape



**Simi Schaerer**  
 Managing Partner  
**Options Group**

## What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

Over the next five years, wealth management will face accelerating digital transformation, increasing regulatory and compliance demands, heightened client expectations, and the largest inter-generational wealth transfer in history. At the same time, firms must compete for scarce advisory and leadership talent while maintaining trust, performance, and personalisation at scale.

We are positioning our business by deepening our specialisation in wealth and private banking, investing in market intelligence, and strengthening our advisory capabilities. Beyond executive search, we partner with clients on succession planning, leadership structure, and cultural alignment. By mapping talent across traditional and emerging platforms—including family offices, alternatives, ESG, and digital wealth—we help firms build leadership teams that are resilient, adaptable, and future-ready. Our focus is on long-term partnerships rather than transactional hiring.

## How do you identify and develop future leaders within your organisation?

We identify future leaders by looking beyond technical excellence to mindset, values, and leadership behaviours. In an industry built on trust, emotional intelligence, ethical judgement, and a client-first philosophy are as important as commercial performance. We assess candidates and consultants through this holistic lens.

Internally, we invest strongly in mentorship, continuous professional development, and international exposure. Senior leaders actively coach high-potential colleagues, sharing both market knowledge and relationship management skills. We encourage early responsibility, client ownership, and cross-border collaboration, enabling emerging leaders to develop confidence,

judgement, and commercial maturity. This culture of accountability and learning ensures a strong leadership pipeline within our firm.

## What does winning this award mean to your firm, and how will you use this recognition going forward?

Winning this award is both an honour and a responsibility. It validates the trust placed in us by our clients and candidates and recognises the dedication and integrity of our team. We see this recognition not as an endpoint, but as motivation to raise our standards further.

We will use this platform to strengthen our positioning as a leading specialist in wealth management executive search, deepen client relationships, and attract exceptional talent to our firm. It reinforces our commitment to delivering rigorous, transparent, and genuinely advisory search solutions. Internally, it energises our people and reinforces a shared commitment to excellence.

## Where do you draw inspiration for innovation - within the wealth industry or beyond it?

Our inspiration for innovation comes from both within and beyond the wealth management industry. Within the sector, we closely follow developments in digital wealth platforms, private markets, family offices, and sustainable investing, which are re-shaping leadership requirements.

Beyond financial services, we learn from technology, consulting, and premium service industries that excel in data utilisation, client experience, and talent development. We are particularly inspired by organisations that combine high performance with strong culture and purpose.

For us, innovation is not about novelty, but about continuously refining how we identify, assess, and support outstanding leaders in a rapidly evolving landscape.

**A good banker  
takes clients  
for dinner.**

**A great  
banker  
gets  
invited.**

At **Piguet Galland**, we are there for our clients wherever they live, with six agencies established in Romandy. With this type of proximity, you're bound to end up taking them to a restaurant where "they do this incredible beef tataki – you'll see when you taste it..." Great, thanks! Next time, dinner's on us.

**Piguet  
Galland**

From private to  
intimate banking.



# Intimate Banking, Designed Around People

At Piguët Galland, *intimate banking* is not a positioning statement; it is the cornerstone of our operating model. We believe that private banking begins with understanding people, not portfolios. Behind every balance sheet is a life story, ambitions and pivotal moments. Our role as a private bank is to listen first, then advise with clarity, transparency and responsibility.

Internally, this philosophy is reflected in the way we are organised. We operate with compact, multidisciplinary teams that enjoy a high degree of autonomy and proximity to clients. This structure allows for fast, collaborative decision-making and ensures that advice remains very personal. Every client relationship begins with a genuine conversation about life events, business transitions, family matters or long-term objectives, before any financial discussion takes place.

Our decision to focus on key cities in French-speaking Switzerland is a deliberate extension of this philosophy. Proximity is not only geographic; it is cultural and relational. By remaining anchored in a limited number of regions, we gain a deep understanding of our clients' environment, enabling long-term trust rather than short-term expansion. We believe intimacy cannot be scaled indiscriminately, it must be cultivated.

While our clients include entrepreneurs, families and individuals, their expectations increasingly converge around three themes: clarity, meaning and trust. Entrepreneurs seek structure and reactivity across both business and personal wealth. Families value continuity and guidance across generations. Individuals look for simplicity and coherence throughout different life stages. Across all segments, clients expect their private bank to provide integrated advice, transparent decision-making and solutions aligned with their values.

Technology plays a crucial enabling role in delivering intimate banking at scale. Our My Piguët Galland digital platform and internal CRM systems provide a consolidated, 360° view of client relationships. By automating routine tasks and improving access to information, digitalisation frees time for meaningful conversations. Technology brings structure; people bring insights.

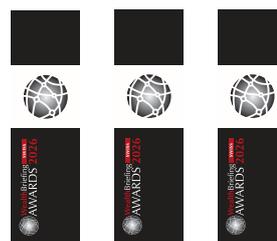
This philosophy is particularly evident in our digital Wealth Assessment, available directly within our mobile banking application. The Wealth Assessment has long been the foundation of our advisory approach, offering a holistic view of a client's financial situation beyond investments alone. Its digitalisation preserves its depth while enhancing accessibility and interaction. Clients can reflect on their priorities, visualise their wealth structure and engage in more focused discussions with their advisor. It is a tangible expression of our belief that digital tools should deepen, not dilute, the relationship.

Ultimately, our ambition is clear: to digitalise processes, not relationships. Every customer journey, from onboarding to portfolio reviews and financing, is designed to be seamless, intuitive and coherent, with the relationship manager remaining at the center. Technology allows us to be more precise, more available and more relevant, while staying true to what defines us.

At Piguët Galland, private banking remains a human craft, strengthened by technology, anchored in proximity, and guided by trust.



**Selman Bicaco Urrutia**  
Head of Private Banking and  
Member of the Executive  
**Piguët Galland**



*Winner*

- **Domestic Private Bank**
- **HNW Team (Swiss Domestic Clients)**
- **Leading Individual**

# Independent & Successful Wealth Management for Private Individuals and Families



**“Your wealth. Your goals. Our independent judgement.”**

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Michael Ganz | [michael.ganz@portascapital.com](mailto:michael.ganz@portascapital.com)

Filomena Quirino | [filomena.quirino@portascapital.com](mailto:filomena.quirino@portascapital.com)

Annick Lauper Jäger | [annick.lauper@portascapital.com](mailto:annick.lauper@portascapital.com)

Beat Kunz | [beat.kunz@portascapital.com](mailto:beat.kunz@portascapital.com)

**PORTAS** ■ **CAPITAL**

# The Path to Success: Trust, Values, Culture and Technology at the Core



**Michael Ganz**  
Partner  
**Portas Capital AG**



## **How do you cultivate a culture that consistently drives excellence and high performance?**

We build a culture of excellence through structured governance, disciplined processes, and clear accountability across all levels. Team members are encouraged to think independently, challenge assumptions constructively, and pursue continuous professional development. By consistently aligning our decisions with the long-term objectives of our clients and maintaining high ethical standards, we create an environment where strong performance is achieved sustainably and always in the best interests of our clients.

Furthermore, while acquisition is important and vital for a company, the focus must clearly be on supporting and servicing existing clients in an excellent manner, particularly in relation to their personal needs as well as our core business of asset management and other financial matters; 10% quantity and 90% quality. This is our credo and way of working.

## **What role has collaboration – either internally or with external partners – played in your success?**

Collaboration underpins how we achieve results. Within the firm, portfolio management, risk, and client advisory teams work closely together to ensure decisions are well-informed and executed consistently.

Beyond the firm, we engage with independent research providers and specialised experts to broaden perspectives and strengthen

the objectivity of our analysis. This collaborative approach not only enhances investment quality but also reinforces the high-performance culture we cultivate internally.

## **What does winning this award mean to your firm, and how will you use this recognition going forward?**

This award represents a recognition of our disciplined approach, robust processes, and dedication to achieving clients' long-term goals. It affirms the quality of our governance, decision-making, and client service. Moving forward, we see this recognition as a motivation to maintain rigorous standards, continue improving our practices, and further deepen trust and transparency with clients and partners alike.

## **Where do you draw inspiration for innovation – within the wealth industry or beyond it?**

We draw inspiration both from trends within wealth management and from developments in areas such as technology, risk management, and organisational design. Industry insights help us refine established best practices, while lessons from other sectors inform improvements in efficiency, transparency, and processes.

We adopt innovations selectively and pragmatically, ensuring that every improvement strengthens our ability to deliver disciplined, sustainable, and client-centred results - while also supporting the collaborative and high-performance culture that defines our firm.



**Switzerland's financial centres, Zurich and Geneva, are at the heart of the global financial services industry. Our clients benefit from our Zurich and Geneva offices, as well as from the worldwide infrastructure of Rawlinson & Hunter's international network.**

**Trust Services** Our legal and accounting expertise allows us to offer all of our services in an in-house, partner-led, bespoke and personal manner. We have extensive experience in advising on the establishment and administration of trusts, private trust companies and foundations, and provide flexibility on the choice of the governing law for our trusts. We provide a full range of fiduciary services at trust level and at the level of their underlying entities.

**Accounting Services** for both trusts and corporate entities are offered and undertaken exclusively in Switzerland. These include traditional bookkeeping services and more specialised accounting for trusts (including specific UK tax pool computations) and special purpose vehicles. In addition to the accounting for our client's structures in-house, we also provide accounting services to other trustees in Switzerland and abroad.

**Partners : Andrew McCallum, William Houseley, Leon Keen**

[www.rawlinson-hunter.ch/switzerland](http://www.rawlinson-hunter.ch/switzerland)

**Zurich:**

Bellevueplatz 5,  
CH 8001 Zurich  
Tel : +41 44 227 6700

**Geneva:**

Rue du Mont-Blanc 4,  
CH 1201 Geneva  
Tel : +41 22 901 0012

# Meeting Future Wealth Management Challenges



**Andrew McCallum**  
Senior Partner  
**Rawlinson & Hunter**  
**(Switzerland) AG**

## How do you cultivate a culture that consistently drives excellence and high performance?

We cultivate excellence by embedding clear values, strong governance and accountability into everything we do. As a trust company, fiduciary responsibility, integrity, and sound judgment set the standard for performance.

We continually aim to attract and develop professionals with strong technical expertise and ethical discipline. On-going personal development is important to us, as is membership to such organisations such as STEP and the Swiss Association of Trust Companies.

Leadership plays a critical role by modelling the behaviours we expect collaboration, transparency and disciplined decision-making. Performance is reinforced through regular feedback, constructive challenge and recognition of high standards.

## What role has collaboration played in your success?

In the trust industry, internal and external collaboration is a core driver of success and inherent to managing risk. Within the complex multinational families with whom we work, no single expert, nor firm, has all the answers, particularly in the global environment in which our clients live. Success is achieved by collaboration across all sectors, including legal, tax, investment, and compliance teams. For some clients, services that can be sourced internally are best sourced externally from the respective family office or professional support network in place around the families for whom we work even when those firms are peer or competitor firms. Collaboration reduces risk, strengthens structures, and gives clients the joined-up advice they expect.

This matters even more in a highly regulated environment. When trustees, compliance teams, legal counsel, banks, and regulators work together, issues are identified earlier, decisions are aligned, and regulatory and reputational risks are best managed.

## What are the key challenges you foresee in wealth management?

This sector shall remain competitive within and across borders. Regulatory developments and geopolitical shifts continue to influence the landscape and service providers continually need to adapt to ensure compliance with international standards and to best meet clients' demands. Secure technology and digital tools shall continue to increase in importance as the industry moves to an AI integrated world. In response to geopolitical and political shifts, we foresee an even bigger demand for Swiss trustee and wealth management as Switzerland is well placed to meet the demand for safety and stability.

## What does winning this award mean to your firm?

Winning this award is a meaningful endorsement of the firm's technical excellence, integrity, and professionalism of our team. It reflects our commitment to delivering high-quality, compliant, and well-considered advice in a complex and regulated environment, while always acting in the best interests of our clients and trusts' beneficiaries.

This recognition reinforces the trust our clients place in us and validates our continued investment in specialist expertise, robust processes, and strong governance. Importantly, it is a testament to our colleagues and their discipline, collaboration, and dedication to maintaining the highest professional standards.

We will use this recognition as a benchmark rather than a destination, motivating us to continue strengthening our accounting and tax capabilities, to share best practices across the industry by continuing to provide training courses such as STEP, and to attract and develop top talent. Above all, it strengthens our resolve to consistently deliver reliable, forward-looking solutions that support our clients' long-term objectives.



Financial guidance backed by  
*two centuries* of experience.



**Rothschild & Co**  
Wealth Management

# Understanding What Matters Most to Our Clients



**Laurent Gagnebin**  
CEO  
**Rothschild & Co**

## How do you cultivate a culture that consistently drives excellence and high performance?

As a family-owned business, we naturally align our interests with those of our clients and take a long-term view that allows us to remain focused on our strategy, avoid short-term pressures, and provide flexible, fully tailored solutions to meet our clients' specific needs. This approach is further strengthened by the close relationships our Client Advisers maintain with their clients, supported by a deliberately limited client base of around 30 relationships per adviser, ensuring truly personalised attention and service.

## What role has collaboration - either internally or with external partners - played in your success?

We foster a culture of open communication and collaboration, which provides a strong foundation for transparent and trusting relationships across our teams, both locally and globally, as well as with our external partners and clients.

This collaborative environment enables us to draw on diverse areas of expertise across our businesses to pursue the best possible solutions for our clients and maintain a consistently high standard of performance across all our activities.

## What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

The current economic and political environment marked by uncertainty and volatility makes trust in one's adviser and strong personal relationships more important than ever. While digital and mobile banking and AI-based tools are becoming more widespread, many clients still value personal guidance to navigate market uncertainty and ensure long-term wealth preservation and growth. As wealth management becomes more digital, cybersecurity has become a critical priority. Protecting sensitive client data and maintaining operational resilience are fundamental to preserving trust in a rapidly evolving environment.

Demographic trends also highlight the increasing importance of thoughtful pension and retirement planning, an area in which we are continually strengthening our capabilities to support clients at every stage of their financial journey. In addition, a growing number of clients have international backgrounds or are in the process of relocating, which underlines the need for expertise across different markets and regulatory frameworks. Our global network positions us well to provide seamless, cross-border support in these complex situations.

## What does winning these awards mean to your firm, and how will you use this recognition going forward?

Winning these awards is a meaningful recognition of our team's dedication and the quality of service we strive to deliver every day. They affirm the strength of our collective effort and reinforce the trust our clients place in us. Beyond the pride they bring, these achievements enhance our credibility in the market and support our positioning when engaging with potential clients.

We see this recognition not as an endpoint, but as a motivation to continue raising the bar. It encourages us to keep refining our offering, strengthening client relationships and consistently delivering the long-term, high-quality service that defines our approach. These awards inspire us to work even harder to meet and exceed our clients' expectations.



# Always by your side

We have the experience and  
expertise you can rely on.  
With our international  
presence and swiss virtues,  
we are the right partner  
for you – wherever you are.



**Schellenberg  
Wittmer**

# A Benchmark for Excellence: Schellenberg Wittmer's Private Wealth Team

## What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?

One of the most important innovations our firm introduced recently are new AI tools which have already delivered significant, measurable impacts on both the efficiency and outcomes for our clients. All tools are particularly helpful for handling and reviewing large case files and accelerates repetitive, high-volume tasks that previously consumed huge amounts of lawyer and junior time.

This innovation allows us to work more efficiently and to shift our time more toward strategic, high-value work (complex negotiation, creative strategy, client counseling) and client interaction.

## How do you cultivate a culture that consistently drives excellence and high performance?

Cultivating a culture of consistent excellence and high performance is key to meet our client's expectation and to provide top level services. We aim at achieving this by hiring the best talents and ensuring that our team members are constantly trained and are further developing their skills so that they remain on top of the technical and legal developments.

As leaders we must model the behaviours we expect from our team and regularly connect our work to its deeper purpose - guiding clients through important financial and emotional decisions that affect families and their legacies. Clear communication, regular training and allocation of ownership and responsibility, combined with the meaningful purpose our work and our inclusive workplace, clearly help to sustain excellence and high performance within our team over time.

## What role has collaboration - either internally or with external partners - played in your success?

Our Private Wealth group is embedded within a fully integrated full-service law firm, where close teamwork and collaboration across practice groups and across the borders are essential to delivering efficient,

precise, timely and fully-tailored solutions to our clients.

We maintain particularly close cooperation with the firm's tax, banking, corporate, real estate and regulatory specialists. Recent examples include:

- working alongside our arbitration colleagues to resolve a complex dispute involving an offshore foundation or a multi-billion inheritance battle;
- partnering with our tax specialists to address sophisticated tax issues that frequently arise in cross-border estate planning as well as in contentious trust and estate matters;
- jointly advising trustees and family offices - together with our regulatory experts - on investment protection structures, sanctions compliance or other regulatory challenges.

Most of our matters have an international angle which requires us to also regularly collaborate with colleagues from abroad. We are proud of having an excellent international network including the top private client lawyers in the world. This integrated approach enables us to provide seamless, high-quality advice even in the most intricate, multi-jurisdictional matters.

## What does win this award mean to your firm, and how will you use this recognition going forward?

Winning this *WealthBriefing* Award (again) is a meaningful recognition of our firm's commitment to excellence and integrity. It validates the quality and constant efforts of our fantastic team and the trust our clients place in us every day. Importantly, it reflects not just strong outcomes, but also the way we achieve them - through discipline, commitment, excellence and team work, allowing us to provide tailor-made solutions that meet our clients' individual needs.

Going forward, we will use this recognition as both an endorsement and a responsibility. It strengthens our credibility with clients and partners and motivates us to continue raising our standards. Rather than seeing the award as a destination, we view it as a benchmark that challenges us to keep innovating and investing in our talents.



**Andrea Dorjee-Good - Partner**  
**David Wilson - Partner**  
**Schellenberg Wittmer Ltd.**



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# Turning Risk Profiling into a Strategic Advantage for Private Banks



**Franck Oliger**  
CEO  
SpeciTec SA

**A**mid market volatility, regulatory pressure, and rising client expectations, private banks must rethink how they assess and manage client risk, as static profiling approaches are no longer sufficient.

At SpeciTec, we treat risk profiling as a continuous, data-driven process embedded in the client and credit lifecycle. Through SpecICRED and SpecIVIM, we help private banks across Europe and APAC transform risk profiling from compliance into a strategic advisory capability.

**What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?**

Our most impactful innovation is the shift from static, questionnaire-based risk profiling to a continuous, data-driven process embedded across the client and credit lifecycle.

By integrating SpecIVIM's Risk Profiling Engine with SpecICRED, private banks align declared risk appetite with actual client behaviour, portfolio dynamics, leverage, and collateral performance, allowing profiles to adjust as conditions evolve. This reduces manual reviews, accelerates suitability assessments, enhances transparency, and enables Relationship Managers to lead more informed, data-driven risk discussions with clients.

**How do you cultivate a culture that consistently drives excellence and high performance?**

At SpeciTec SA, excellence is driven by accountability, expertise, and close client engagement. Our teams combine senior banking practitioners with experienced technologists who understand both regulatory requirements and operational realities.

We measure performance by tangible client impact rather than theoretical output. Continuous feedback from production environments shapes product evolution, fostering shared responsibility for quality, reliability, and long-term client value.

**Can you share a story that best illustrates your team's commitment to client service or problem solving?**

Several clients initially treated risk profiling as a compliance exercise, managed through disconnected tools and periodic

reviews. By redesigning it as a living process embedded in daily advisory and credit decisions, we turned a regulatory requirement into a value-adding client interaction.

Relationship Managers can now show in real time how leverage and market movements affect portfolio risk. This transformed risk discussions into collaborative advisory conversations, while significantly reducing compliance exceptions and exposure breaches.

**What role has collaboration – either internally or with external partners – played in your success?**

Collaboration is central to our approach. Internally, engineers, credit specialists, and wealth management professionals work closely to ensure innovation meets real operational needs.

Externally, we partner with private banks and core banking providers to deliver seamless integration across complex, multi-entity environments. Many advanced risk features are co-designed with clients, accelerating adoption and long-term value.

**What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?**

Private banks face rising regulatory scrutiny, market volatility, and growing client demands for transparency. Static risk models and fragmented systems are no longer sufficient.

We focus on continuous risk intelligence, automation, and data coherence across the client lifecycle. By linking investment risk, credit exposure, and behavioural insights, we help banks maintain control while delivering more personalised and resilient advisory models.

**What does winning this award mean to your firm, and how will you use this recognition going forward?**

Winning the *WealthBriefing* Swiss Award for 'Risk Profiling Solution' validates our belief that risk profiling should be continuous, transparent, and fully integrated into the client journey.

The recognition enhances our credibility in Europe and APAC and reinforces our commitment to advanced risk analytics that empower advisors rather than replace their judgment.



# At Syz we know great ideas when we see them

Ideas like giving every client access to innovative investments.

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Or making bank ads that don't look like bank ads.

E=MSyz<sup>2</sup>



Private Banking  
Alternative Investments  
Asset Management  
External Asset Managers

Syz

30<sup>TH</sup>  
ANNIVERSARY  
1996 - 2026

# Collaborative Success: Inside Syz Bank's Approach to Empowering External Asset Managers



**Etienne Billaud** - Head of External Asset Managers  
**Syz Bank**

## How do you cultivate a culture that consistently drives excellence and high performance?

We foster a culture of excellence and high performance by prioritising responsiveness and service quality. Our dedicated team of 20 professionals based across our offices in Geneva and Zurich ensures that every client enquiry and request is addressed promptly and efficiently, setting us apart through our commitment to exceptional service for External Asset Managers.

## Can you share a story that best illustrates your team's commitment to client service or problem solving?

One of the best examples of our commitment to client service is the seamless onboarding experience we provide. A key factor in this process is the presence of an integrated Business Risk Manager within the EAM Team. This role ensures that all account openings are thoroughly and efficiently reviewed before reaching compliance, allowing us to anticipate and resolve potential issues early. As a result, clients benefit from swift and smooth onboarding, reflecting our dedication to both service quality and robust risk management.

## What role has collaboration - either internally or with external partners - played in your success?

Collaboration is central to our success at Syz. The EAM Team operates within the private bank, enabling us to offer our investment platform to External Asset Managers. The involvement of our CIO, Charles-Henry Monchau, and his team of over 35 investment specialists is instrumental. Their high-quality research and insights which are made available to our clients, combined with their accessibility, add significant value to our offering.

Our innovative 'Syz as a Service' solution further leverages our investment and wealth management expertise, as well as our operational capabilities. We can partner with EAMs as an extension of their organisation, allowing them to benefit from our skills and the support of a dedicated team of professionals. Today we successfully collaborate with EAMs in Dubai, Mauritius, and Switzerland, providing a range of tailored outsourced CIO services - from active participation in investment committees to the provision of model portfolios. These collaborations are a growing requirement for EAMs who seek to optimise time and resources whilst continuing to respond to challenging regulatory frameworks.

## What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

Over the next five years, we anticipate continued growth in the share of assets allocated to wealth management, particularly among independent asset managers, as clients increasingly seek greater choice, independence, and bespoke services. To meet these evolving demands, we are positioning ourselves as the leading Swiss family-owned private bank dedicated to serving External Asset Managers (EAMs).

Our proactive approach includes remaining closely attuned to the changing requirements of our clients and continuously adapting our services and offerings. Notably, we were among the first private banks in Europe to offer digital asset custody and trading, and we continue to expand our crypto capabilities with the support of a dedicated Digital Assets Development Team. This enables us to respond effectively to the growing interest in digital assets, especially among the next generation of clients.

WE CANNOT DIRECT THE WIND...



...BUT WE CAN ADJUST THE SAILS.

ASSET MANAGEMENT | WEALTH MANAGEMENT | FAMILY OFFICE



# Structured, Evidence-Based Investing Driving Clarity, Resilience and Client Confidence

## What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?

Our most impactful innovation has been the introduction of a structured, evidence-based investment framework that continuously tests every position from multiple angles. Each investment must be economically sound, supported by market behaviour, and coherent within the overall portfolio risk profile.

This approach prevents strong convictions from becoming blind spots and enables us to react early when conditions change. At the same time, it provides the confidence to stay invested when evidence supports the strategy.

For clients, this results in more resilient portfolios, improved risk management, and a transparent investment process that remains robust across market cycles.

## How do you cultivate a culture that consistently drives excellence and high performance?

Our culture is built around one core principle: clients should feel confident that their wealth is managed in a disciplined, structured, and reliable way at all times.

We work with clear processes, defined responsibilities, and continuous risk oversight. Clients understand what they own, why they own it, and how each position contributes to their overall objectives. This clarity builds trust and reduces uncertainty.

We operate with a lean, senior team and minimal hierarchy. Decisions are challenged openly and based on facts, not hierarchy. Clear communication is essential. If an investment cannot be explained simply and convincingly, it does not belong in the portfolio.

This creates a culture that is focused, accountable, and consistently aligned with long-term client interests.

## Can you share a story that best illustrates your team's commitment to client service or problem solving?

A client approached us because his portfolio had become fragmented over time. Individual investments made sense on their own, but together they lacked structure and no longer reflected his priorities.

Before discussing markets, we focused on understanding his mindset, risk tolerance, and long-term objectives. Based on this, we rebuilt the portfolio around a clear framework, reduced unnecessary complexity, and ensured every position had a defined role.

What mattered most to the client was not a single investment decision, but the renewed sense of clarity and control. His assets were once again aligned with his goals, and he felt confident that his wealth was being managed with purpose and discipline.

## What role has collaboration - either internally or with external partners - played in your success?

Collaboration is central to how we manage and protect client wealth. Our close partnership with Dr. J. Bollag & Cie. AG allows us to combine asset management with tax, legal, and structural expertise, particularly in complex situations such as succession planning or cross-border matters.

Internally, collaboration is embedded in our investment process. Decisions are reviewed from multiple perspectives, combining research, risk management, and market analysis to ensure assumptions are challenged before capital is committed.

Beyond Switzerland, we serve an international client base ranging from Australia to continental Europe through trusted intermediaries who share our standards and long-term approach. These partnerships ensure consistent execution, aligned expectations, and transparent communication across jurisdictions.

For clients, this collaborative structure translates into clarity, continuity, and confidence that their wealth is managed holistically and responsibly



**Raphael Mueller**  
CEO  
**Tramondo Investment  
Partners AG**



U n i q u e M i n d f u l A s s u r e d

# We are UMA

## WEALTH MANAGEMENT SERVICES

UMA Group (UMA) is a private client and family wealth consultancy group specializing in tailored wealth management services for individuals, families, and companies. As a boutique service provider, we combine our expertise with customized solutions to meet the unique needs of our clients.

[www.umawealth.com](http://www.umawealth.com)



# Insourcing Intelligence: Building Control, Resilience, and Clarity in Modern Wealth Management



## UMA Wealth (Switzerland) AG

### What has been the most impactful innovation your firm has introduced recently, and how has it shaped client outcomes and internal efficiency?

Our most consequential recent innovation has been structural rather than technological: the deliberate insourcing of IT, cybersecurity, and systems development as a core discipline. For a firm stewarding complex, cross-border family wealth, this choice is fiduciary as well as operational.

By designing, operating, and securing our own environment, we control data integrity, access governance, and cyber resilience. This reduces reliance on third parties and responds to growing client concern about the exposure of sensitive information in an increasingly digitised wealth landscape.

Alongside this, we continue to invest in automation, CRM architecture, and reporting, with cautious evaluation of AI-enabled tools. Technology is deployed to improve precision, responsiveness, and coordination, allowing senior professionals to focus on judgement, governance, and decision-making. The result is a more resilient operating model and consistently clearer outcomes for clients.

### What role has collaboration—internally and with external partners – played in your success?

In cross-border private wealth, collaboration is not a cultural aspiration, it is a practical control framework.

Internally, we work across jurisdictions with shared accountability for clients and deliberately flat structures. Teams collaborate fluidly across offices, senior partners remain closely involved, and mentorship is embedded in daily practice. Our linguistic and cultural diversity is a working asset, enabling nuance in jurisdictions and family situations where subtlety often determines success.

Externally, collaboration begins with discernment. We do not seek to supplant a client's existing advisers, but to integrate with them. Great care is taken in selecting and maintaining relationships

with lawyers, accountants, trustees, and specialist advisers. We invest time in these relationships – often in person – because recommending a professional partner is, in effect, an extension of our own fiduciary responsibility.

### What key challenges do you foresee in wealth management over the next five years, and how are you positioning your firm to meet them?

The coming years will be defined by converging pressures: cybersecurity risk, the responsible application of AI, regulatory fragmentation, and heightened expectations around transparency and responsiveness.

Our response is intentional restraint. We are building internal capability to evaluate tools rigorously and avoid solutions that add complexity without improving outcomes. Technology must support judgement, not obscure it. Our investments are designed to enhance the effectiveness of our people, improving accuracy, strengthening reporting, and reinforcing operational control, whilst preserving the discretion and continuity private clients rightly expect.

### What does winning this award mean to your firm, and how will you use this recognition going forward?

The award is meaningful because it recognises a discipline that is often underappreciated: the ability to convert complexity into decisions that are both implementable and enduring.

For our team, it is an affirmation of work already embedded in our culture. For the wider market, it offers visibility through *WealthBriefing's* international reach. We will treat the recognition not as a conclusion, but as a form of accountability, continuing to deepen our governance diagnostics, strengthen security and reporting infrastructure, and develop leadership across jurisdictions, while preserving the defining characteristics of a true boutique: continuity, senior attention, and advice that withstands scrutiny.

# The global private client law firm

---

We are trusted advisors to families, founders, fiduciaries and businesses - and more than this, to governments, charities and financial institutions.

We structure, grow and preserve capital. We protect reputations and relationships, ideas and innovations. We secure our clients' legacies across generations.



# Market-Leading Cross-Border Estate Planning from Switzerland



**Justine Markovitz - Partner**  
**Berry Bloomberg - Partner**  
**Withers**

**O**ur Swiss private client team advises high and ultra-high-net-worth individuals and prominent families on a broad range of UK and US tax issues, cross border estate planning, trusts, wills, and succession matters. Withers' distinctive one firm, global model enables seamless collaboration across international offices, allowing us to manage complex cross border wealth planning and probate matters and deliver a comprehensive, integrated service that few competitors can match.

Our market leading US qualified capability supports clients across Europe and Switzerland with multi jurisdictional needs, while changes to the UK non dom regime have led to increased demand for global mobility and international structuring advice, in which our Swiss team is playing a central advisory role.

**What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?**

Our firm has introduced AI software across various platforms, providing a powerful efficiency tool that significantly reduces the time spent on research, document review and drafting. This has allowed our lawyers to focus on higher value advice, resulting in faster turnaround times and lower overall costs for clients.

**How do you cultivate a culture that consistently drives excellence and high performance?**

We seek to embed a firm wide high performance culture that combines strong collaboration, inclusivity and care for colleagues with clear standards, accountability and discipline.

*The firm has a program that actively builds on and reinforce our key values: positive relationships, genuine teamwork and a relentless focus on delivering outstanding value to clients.*

**What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?**

Wealth management over the next five years will be shaped by growing regulatory and fiscal complexity and the challenges of managing increasingly international and multi generational wealth.

Withers is responding by investing in cross border expertise, collaboration across disciplines and geographies and technology that improves efficiency while preserving a highly personal, trusted adviser approach.

**What does winning this award mean to your firm, and how will you use this recognition going forward?**

Winning the *WealthBriefing* Swiss Award for 'Estate Planning Advice' is a strong endorsement of the quality, depth and cross border expertise of our private client practice in Switzerland.

We will use this recognition to strengthen our market profile in Switzerland and internationally and continue attracting exceptional talent committed to delivering outstanding estate planning advice.



# wize

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 TEAMWORK

# A New Entrant in the Core Banking System Market for Private Banks in Switzerland

## What sets you apart from your peers and why?

WIZE by TeamWork, the all-in-one Wealth & Asset Management solution, is one of the fastest growing WealthTech companies in Switzerland historically dedicated to External Asset Managers (EAM), Family Offices (FO), Fund managers and Pension funds.

Since 2025, WIZE also exists in a full Front to Back Core Banking System version for Private Banks and Securities Firms.

This is a major move for WIZE in the Swiss Private Banking industry since, to our knowledge, the last time a new Core Banking package arrived on this market was Avaloq, 25 years ago...

We are therefore extremely excited to bring Private Banks a major innovation: the capability to manage private clients non-deposited portfolios in addition to the classical management of deposited assets. WIZE is indeed the first ever Core Banking System that will natively allow Private Banks to optimise their cost/income ratio by enabling classical costs savings thanks to a higher automation level but more importantly creating opportunities of new sources of revenue by offering Wealth Management mandates to non-deposited private clients.

This new operational capability in the Private Client market will be a key element to reduce risks and higher revenue of Private Banks when new Relationship Managers will be hired since statistics show that, on average, they only succeed to transfer 30 to 50% of their clients' assets in the new custodian bank. With WIZE, they will be able to offer Wealth Management mandates to all their clients while only a part will transfer their assets in custody.

## Does it mean a revolution for WIZE by TeamWork with a full focus on this market?

No, absolutely not, this is simply a natural evolution!

Our historical core market is to offer a wealth & asset management platform to External Asset Managers who need to be connected to multiple custody banks. This will not change for us as, with connectivity to 250+ booking centres of custodian banks and 30+ trading rooms of brokers or banks in Straight Through Processing, we benefit from a large scope of functionalities to serve these clients, and we continuously invest in the development of new functionalities to enforce our competitive advantage.

At WIZE by TeamWork, we simply carefully listen to our clients and analyse their change requests in our weekly product committee. We already have Private Bank clients for more than 10 years using WIZE as a Front Office system connected to their Core Banking System. They knew our custodian Securities Firms clients had the possibility to manage deposited and non-deposited assets for already more than 10 years too and this capability is now also a very appealing source of revenue for Private Banks. We therefore accepted this challenge and planned the development of these new functionalities over multiple years with our first Private Bank client successfully migrated on the WIZE full Core Banking System on 1st January 2025 in Zurich.

This great achievement from our teams offers new opportunities for WIZE by TeamWork but we will continue to be very active on our historical External Asset Managers core market as its growth in Switzerland, UK, Singapore, Luxembourg and Middle East is very impressive.



**Pierre Dupont**  
Managing Partner  
**WIZE by TeamWork**







**WINNER: ITERAM Capital**



**WINNER: Carmen Kiavila - Kiavila Avocats**



**WINNER: Lakefield Partners**



**WINNER: Lombard Odier**



**WINNER: Syz Bank**



**WINNER: Lombard Odier**



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# The Thirteenth WealthBriefing Swiss Awards Winners 2026

## PRIVATE BANKING CATEGORIES

### Domestic Private Bank

Piguet  
Galland &  
VOUS.



WINNER

### Foreign Private Bank

INDOSUEZ  
WEALTH MANAGEMENT

WINNER

### Foreign Private Bank

BIL  
1856  
SUISSE

COMMENDED

### Private Bank Leadership Team

BARCLAYS | Private  
Bank

WINNER

### Private Bank Operations Team

CIC

WINNER

### HNW Team (Swiss Domestic Clients)

Piguet  
Galland &  
VOUS.



WINNER

### HNW Team (International Clients)

Rothschild & Co  
Wealth Management

WINNER

### UHNW Team (Swiss Domestic Clients)

BARCLAYS | Private  
Bank

WINNER

### UHNW Team (International Clients)

Rothschild & Co  
Wealth Management

WINNER

### Family Office Offering

Azura  
PARTNERS

WINNER

### Client Initiative

BANQUE  
HERITAGE

WINNER

### Credit Provider

CIC

WINNER



**WINNER: Piguet Galland**



**WINNER: Rothschild & Co Wealth Management**



**WINNER: Schellenberg Wittmer Ltd.**



**WINNER: SpeciTec SA**



**WINNER: Sygnum Bank AG**

## PRIVATE BANKING CATEGORIES - CONTINUED...

*Customer Facing Digital Capabilities*

WINNER



**LOMBARD ODIER**  
LOMBARD ODIER DARIER HENTSCH

## MARKETING/PR CATEGORIES

*Marketing Campaign or Team*

WINNER

*International Marketing Campaign or Team*

WINNER

*Use of Social Media*

WINNER

*Marketing Individual*

WINNER

ANNE LIEBGOTT



**AW+SWITZERLAND**  
americanswelcome.swiss

## EXTERNAL ASSET MANAGER (EAM) CUSTODIAN CATEGORIES

*Overall Platform for External Asset Managers*

WINNER

*Onboarding Programme for External Asset Managers*

WINNER



**BASIS  
POINT**

**Time for some CHANNEL real talk!**

**The essential  
is never overstated**



## INVESTMENT MANAGEMENT CATEGORIES

*Fund Manager*

WINNER

*Alternative Fund Manager*

WINNER

ITERAM

*Private Investment Office/  
Multi-Family Office*

WINNER

BEDROCK

*Independent Asset Manager  
with Assets Under CHF 500  
Million AuM*

WINNER

ERLEN

*Independent Asset Manager  
with Assets Between CHF 500  
Million - CHF 1 Billion AuM*

WINNER

HYPOSWISS  
ADVISORS*Independent Asset Manager  
with Assets Over CHF 1 Billion  
AuM*

WINNER

PORTAS CAPITAL

*FX Solution Provider*

WINNER

 INDOSUEZ  
WEALTH MANAGEMENT
*Fixed-Income Investment  
Strategy*

WINNER

*Equity-Based Investment  
Strategy*

WINNER

lakefield partners

*Digital Assets Advisory*

WINNER

SYGNUM

*Private Market Investment  
Specialist*

WINNER

GOLDBACH  
CAPITAL*Investment Consultancy*

WINNER

*Innovative Financial Product  
or Service*

WINNER

 ARTEMON  
Capital Partners
*Paying Agent*

WINNER

ISP

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## WEALTH MANAGEMENT TECHNOLOGY CATEGORIES (VENDORS)

*Front Office Solution*

WINNER



**avalog**  
An NEC Company

*Transaction Processing Solution*

WINNER



**eRI**<sup>®</sup>

*Portfolio Management Solution*

WINNER



**Capital Banking Solutions**  
EXPERIENCE INNOVATION

*Client Communications Solution*

WINNER



**ALTOO**

*Client Reporting Solution*

WINNER



**InvestSuite**

*CRM System*

WINNER



**WEALTH DYNAMIX**

*Technology Outsourcing Solution*

WINNER



**A Z Q O R E**

Business and tech partners  
for wealth managers

*Data Provider*

WINNER



**FACTSET**

*Client Accounting System*

WINNER



**FundCount**

*Risk Profiling Solution*

WINNER



**specitec**  
ADVANCED SOFTWARE SOLUTIONS

*Risk Management Solution*

WINNER



**WIZE**  
BY TWJ

*Onboarding Solution*

WINNER



**investcloud**

*Innovative use of Artificial Intelligence*

WINNER



**mastro**

# Powering the Top 1% Wealth Managers Globally

Build, scale, and personalize digital wealth ecosystems powered by intelligence, beyond spreadsheets.

**Core Infrastructure:**  
Wealth. Reimagined & Rebuilt.

**The Promise:**  
From Data to Decisions.

Valuefy transforms how wealth is managed, with AI-driven insights and modular digital infrastructure that power over \$350B in AUM across 10 countries. From private banks to family offices, we deliver the intelligence backbone for the next era of wealth management.

## Who We Empower

**Banks & FIs:** Reimagine digital wealth journeys with intelligent automation.

**Wealth Managers:** Augment human expertise with machine precision.

**Family Offices:** Simplify complexity with unified, AI-driven views of wealth.

## Global Network

Over 30+ EAMs and Family Offices | 50+ Custodian Integrations  
Presence in Switzerland, UK, Dubai, Singapore, India



SCAN TO SEE  
LIVE IN ACTION

## WEALTH MANAGEMENT TECHNOLOGY CATEGORIES (IN-HOUSE SOLUTIONS)

*Most Innovative Client Solution*

WINNER

valuefy<sup>®</sup>*Innovative use of Artificial Intelligence*

WINNER


 BIL  
1856  
SUISSE

## PRIVATE CLIENT CATEGORIES

*Legal Team*

WINNER


 Schellenberg  
Wittmer
*Private Client Law Firm*

WINNER


 Dr. J. Bollag & Cie. AG  
FAMILY OFFICE  
LEGAL  
FINANCE
*Tax/Accountancy Team*

WINNER


 RAWLINSON & HUNTER
*Independent Trust or Fiduciary Company*

WINNER


 ACCURO  
Trust and Private Office
*Estate Planning Advice*

WINNER


 withers
*Family Law Legal Team*

WINNER


 Kiavila  
Avocats
*Private Client Lawyer*

WINNER

CARMEN KIAVILA


 Kiavila  
Avocats



**WINNER: Syz Bank**



**WINNER: Tramondo Investment Partners AG**



**WINNER: Valuefy Solutions Limited**



**WINNER: Wealth Dynamix**



**WINNER: Withers**

## SPECIALIST WEALTH MANAGEMENT CATEGORIES

*Corporate Social Responsibility*

WINNER


 INDOSUEZ  
WEALTH MANAGEMENT
*Wealth Management Executive Search Firm*

WINNER


 OPTIONS  
GROUP
*Wealth Planning Team*

WINNER


 EFG  
Private Banking
*ESG*

WINNER


 EDMOND  
DE ROTHSCHILD
*Impact Investing*

WINNER


 EDMOND  
DE ROTHSCHILD
*Most Promising New Entrant*

WINNER


 AUREA  
GLOBAL INVESTMENTS
*Corporate Services*

WINNER


 SFM
*International Wealth Planning Solution*

WINNER


 alpenpartners
*Insurance Offering*

WINNER


 INDOSUEZ  
WEALTH MANAGEMENT
*Management Consultancy*

WINNER


 uma  
wealth    uma  
swiss



**WINNER: WIZE by TeamWork**



**WINNER: Iskra Martin - Azura Partners**



**WINNER: Schellenberg Wittmer Ltd.**



**WINNER: Andrea Paglialonga - Banque Internationale à Luxembourg (Suisse)**



**WINNER: Selman Bicaco - Piguet Galland**



**WINNER: Indosuez Wealth Management**



**WINNER: Syz Bank**

LEADERSHIP CATEGORIES

*Women In Wealth Management  
(Company)*

WINNER



*Outstanding Contribution To Wealth  
Management Thought Leadership (Company)*

WINNER



*Women In Wealth Management  
(Individual)*

WINNER

ISKRA MARTIN



*Leading Individual*

WINNER

SELMAN BICACO



*Leading Private Bank Chief Technical  
Officer (CTO)*

WINNER

ANDREA PAGLIALONGA





# AUTOMATED SOURCE OF WEALTH VERIFICATION

AI-powered technology to automate due diligence about the existence, plausibility and evidence of client wealth



smartKYC's solution automates end-to-end Source of Wealth and Journey to Wealth verification using AI-driven corroboration and generative narratives, delivering credible, regulator-ready documentation with complete transparency.



## Data Collection

Structured client-declared wealth events - employment, business exits, inheritance, property, investments



## AI Corroboration

Cross-check events with salary benchmarks, real estate records, company registries, and media coverage



## Narrative Generation

AI creates clear, regulator-ready wealth narratives with full source traceability

## Key Features & Benefits

- ✔ **Purpose-Built for Private Banking**  
Designed specifically for HNW/UHNW SoW and JoW compliance requirements
- ✔ **Multi-Source Validation**  
Cross-checks declared data with public benchmarks and registries
- ✔ **Fully Explainable**  
Every fact sourced, logged, and transparent for regulator scrutiny
- ✔ **Generative AI Summaries**  
Creates audit-ready narratives in plain English automatically
- ✔ **Periodic Refresh**  
Enrich the client wealth profile with new wealth events



## GET IN TOUCH

Website: [smartkyc.com](https://smartkyc.com)

Email: [info@smartkyc.com](mailto:info@smartkyc.com)

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