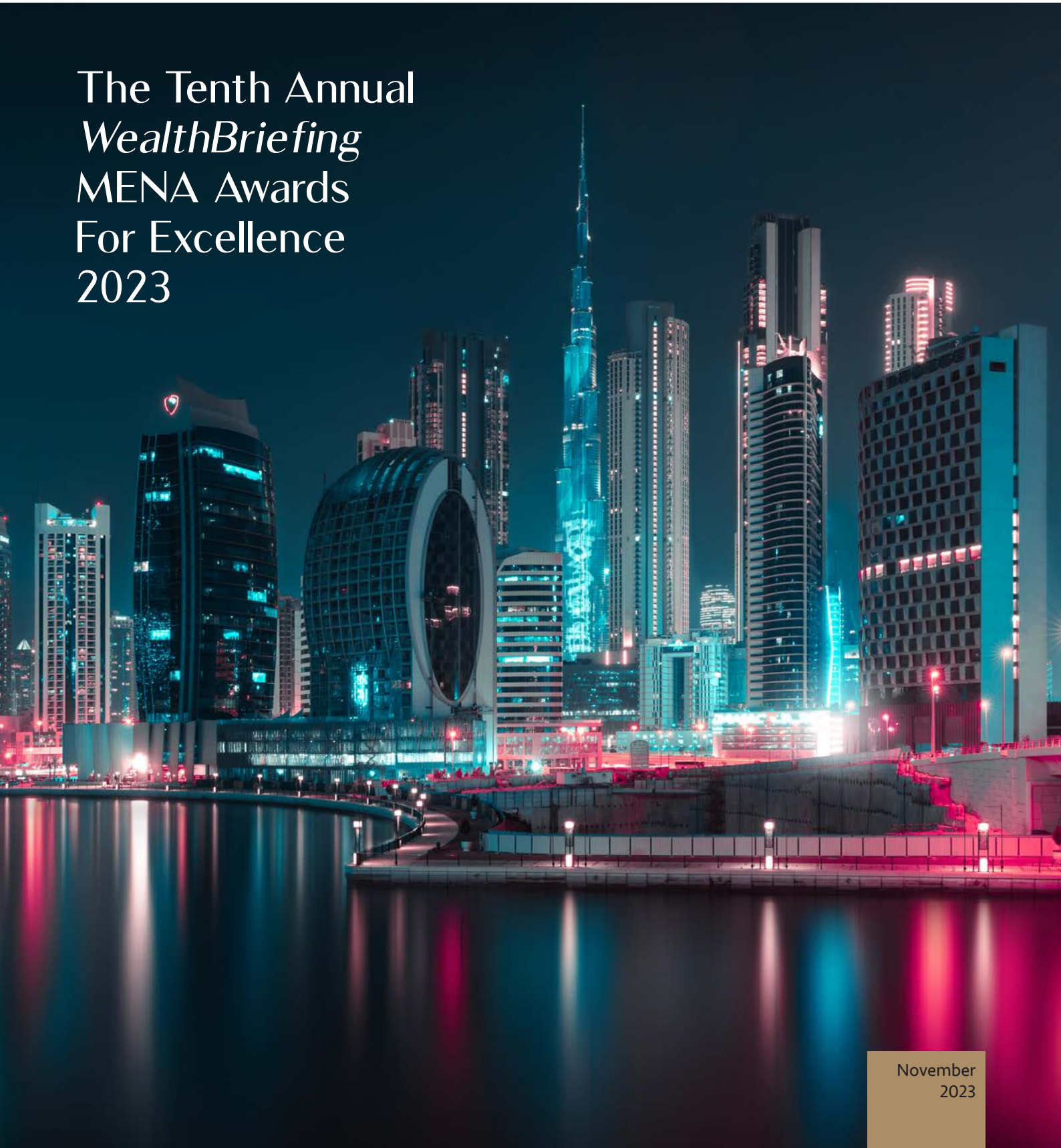
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RECOGNISING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY
THROUGH THE WealthBriefing AWARDS PROGRAMME



The Tenth Annual *WealthBriefing* MENA Awards For Excellence 2023

November 2023

LSEG Wealth Solutions

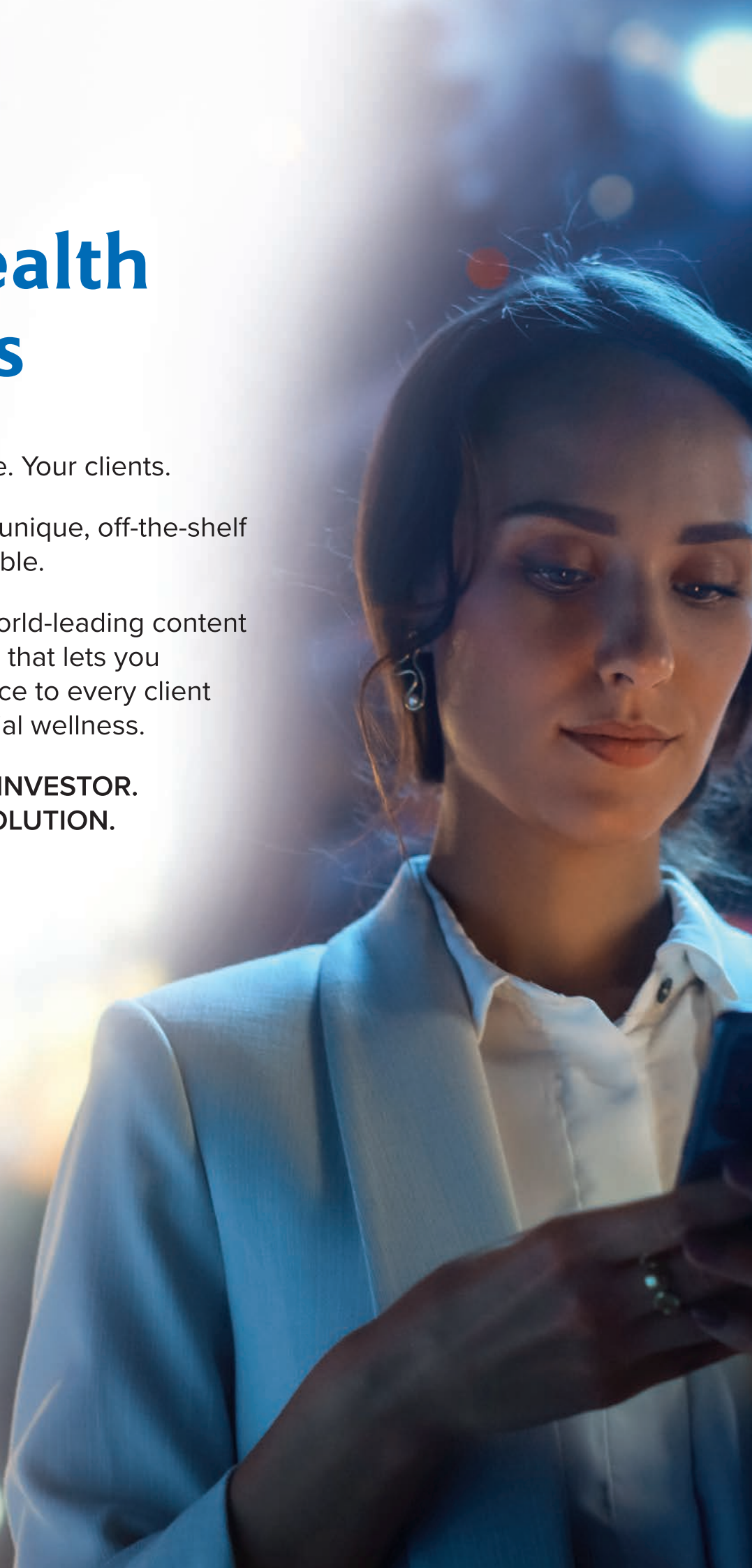
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LSEG



Foreword

TOM BURROUGHES
Group Editor, *WealthBriefing*

Now in their 10th year, the *WealthBriefing* MENA region awards are a tremendous opportunity for top-class firms and individuals to showcase their achievements and remind a wide audience of how they affect the economy and the lives of families across the region.

At the core of all *WealthBriefing* awards is the judging process. A panel of experts, chosen for their experience, diligence and independence of view, examine a large number of entries and arrive at a list of winners. As we are reminded every year, their commitment is deeply appreciated. The team at *WealthBriefing* continues to take feedback about categories, and we keep the programme under constant review.

Like other regions, the Middle East and North Africa wealth market is going through great change, requiring expert help. To do this job requires patience, cultural understanding, and a constant willingness to learn. These awards are a salute to the men and women who display those qualities, and their quest to stay at the forefront of excellence in wealth management.

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Overview of the MENA Wealth Management Industry

While global markets slid in 2022, pulling down the population total for high net worth individuals (source: Capgemini *World Wealth Report*, 2023), the Middle East and Africa regions bucked the trend. In the Middle East, total HNW individual wealth rose 1.5 per cent, and in Africa, it rose 1.6 per cent. Geopolitical issues helped push up oil and gas prices – which tends to boost the MENA region. In 2022, Boston Consulting Group predicted that the Kingdom of Saudi Arabia, which is ramping up moves to be an important wealth centre, would chalk up a compound annual growth rate in new wealth of 4.8 per cent, rising from $1.3 trillion to $1.6 trillion from 2021 to 2026. In the United Arab Emirates, the jurisdiction is already known as a wealth hotspot and home to international banks and large domestic players. International institutions such as Citi Private Bank and UBS have significant outfits in the Gulf Region, along with local organisations such as Emirates NBD and QNB. A crop of overseas banks has set up shop to tap local, as well as international, wealth. In Dubai, for example, the DIFC has moved to attract family offices. Abu Dhabi Global Market has also made a push into this space. Several external asset managers have obtained licences, and firms such as Bank of Singapore, for example, are serving them. Separately, law firms, accountants, fiduciary service providers and other specialists see opportunities to make headway. Technology is also increasingly important. With firms such as Switzerland's SEBA Bank, which straddles traditional and crypto assets, obtaining local licences, the MENA region is determined to keep up with, and even surpass, rival regions. The MENA region defies easy generalisation, given the complex patchwork of jurisdictions, local markets, and ways of work. It promises to be a fascinating market to cover for years to come.

RECENT RESEARCH OUTPUT

FamilyWealthReport
North American Family Office Intelligence

WealthBriefing
News Insight Intelligence

Why Wealth Managers are the Ultimate Private Market Matchmakers
(in partnership with Hywin Wealth & VP Bank)
This report tackles both the supply and demand for private market opportunities in both the Asia-Pacific region and globally, a topic which will continue to be hugely important for the wealth management industry as H/UHNWs seek enhanced returns and diversification in a challenging investment environment and billions of "dry powder" await deployment.

External Asset Managers in Asia - New Directions for Rapidly-Expanding Sector
(in partnership with UBS)
Our second annual report examining the growth of Asia's EAM sector, covering both the powerhouses of Singapore and Hong Kong, and emerging markets like Thailand and the Philippines. This study looks at the growth prospects for independent advisors in the round as they seek to tap the region's booming wealth and growing client acceptance of the EAM model.

Family Office Focus: An Update of the Industry's Efficiency in Accounting and Investment Analysis
(in partnership with FundCount)
A deep dive into the key technological and operational challenges facing family offices in their accounting and investment analysis activities. Based on surveys and interviews among family offices managing over $72 billion in assets, this is an invaluable benchmarking tool for the sector which presents fascinating insights into future developments from a range of industry experts.

Applying Artificial Intelligence in Wealth Management - Compelling Use Cases Across the Client Life Cycle
(in partnership with Finantix & EY)
This comprehensive report identifies elements of the institution and advisor's workloads that are ripe for AI amelioration, and points the way for firms seeking to maximise the competitive advantages offered by new technologies. AI experts and senior industry executives enrich each chapter, answering crucial questions on risk, KYC/AML, compliance, portfolio management and more.

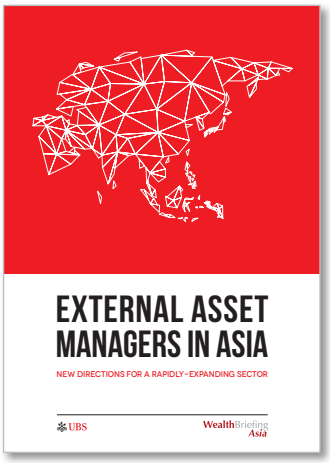
Decoding The Digital Landscape for UHNWIs
(in partnership with Jersey Finance)
This report explores the digitalisation of - and digital assets in - Jersey's wealth management sector. It explores the shifting sands - both economic and regulatory - on which the digital sector rests.

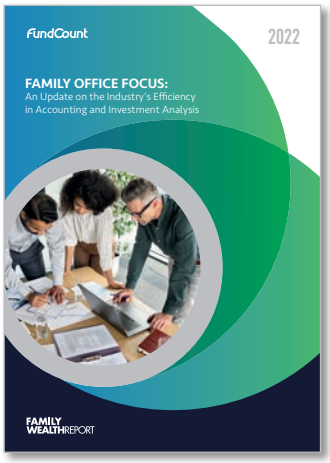
Winning Women in MENA
(in partnership with First Abu Dhabi Bank)
This ground breaking new research examines the growth of female entrepreneurship in the region. More specifically it looks at how women are driving family office strategy as well as the relationship between MENA's UHNW female clients and the wealth management industry.

Technology & Operations Trends in Wealth Management 2023
(in partnership with SS&C Advent)
This succinct yet wide-ranging report shines a light on both macro and micro trends, beginning with industry growth sentiment and ending on operating model evolution, taking in every key area of development in between. It brings together datapoints and candid comments senior executives at leading consultancies across the world's major wealth markets to create an invaluable peer benchmarking tool.

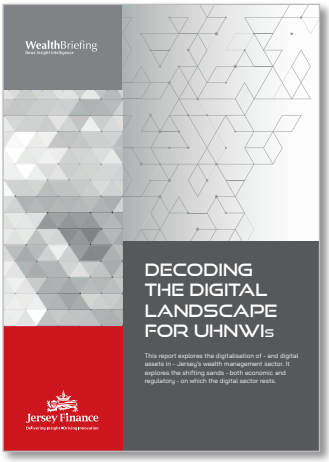
Technology Traps Wealth Managers Must Avoid 2023
(in partnership with EY)
With EY providing the overview, this report draws on the front-line experience of many of the technology sector's biggest names, in recognition of the fact that they are the ones going in to solve wealth managers' most pressing problems and have typically seen the ramifications of firms' choices play out numerous times – not to mention in various contexts globally.





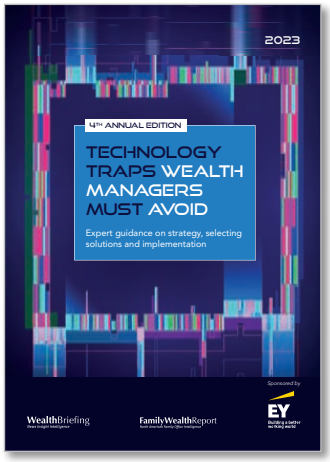












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The Judging Panel

The *WealthBriefing* MENA Awards 2023 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 MENA region.

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



MANNAN ADENWALLA
Managing Director
LGT Bank (Middle East)



LAURENCE BLACK
Regional Director, Client Solutions, MENA
Asiaciti Trust Group



CÉCILE CIVIALE VUILLIER
CEO, Group Head of Private Client
TrustConsult Group S.A



PATRICK CROWLEY
Executive Director
Banque Richelieu GCC



PRZEMYSLAW DRZYMALA
Executive Vice President of Global Sales EMEA, Financial Services Division
Comarch SA



GAIL JOHNSON-GORING
Partner & Head of Practice - Regulatory and Compliance Services
Re/think



ISMAEL HAJJAR
Partner
PwC Middle East



HASSEN JAUFEERALLY
Senior Relationship Manager
The Mauritius Commercial Bank



VIPUL KAPUR
Managing Director, Head of Private Banking
Mashreq



STELA KOTE
Chief Executive Officer
Index & Cie



JACQUES-ANTOINE LECOINTRE
Managing Director, Chief Operating Officer
BNP Paribas Wealth Management



MARTIN LIEBI
CEO
ODDO BHF (Switzerland)



YANN MRAZEK
Managing Partner
M/HQ



LYNDA O'MAHONEY
Global Head of Business Development – Private Clients
Ocorian



YASMINE OMARI
Director
EY MENA



BRUCE WEATHERILL
Chief Executive
Weatherill Consulting



SAMIRA ZAKOUR
Managing Director & Global Head of Private Banking & Key Client Group
FAB Private Banking

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RASHA BADAWI
WINNER
BARCLAYS | Private Bank
LEADERSHIP AND INDIVIDUAL CATEGORIES
Leading Private Bank Chief Executive Officer
Leading Woman in Wealth Management
MENA 2023


WealthBriefing MENA AWARDS 2023
ALPADIS
amdax
LSEG
Huddleston Jones
COMARCH
RIGHT TO


BearBull
Global Investments Group Limited
WINNER
INVESTMENT CATEGORIES (MENA)
Multi-Family Office (MFO)
WealthBriefing MENA AWARDS 2023

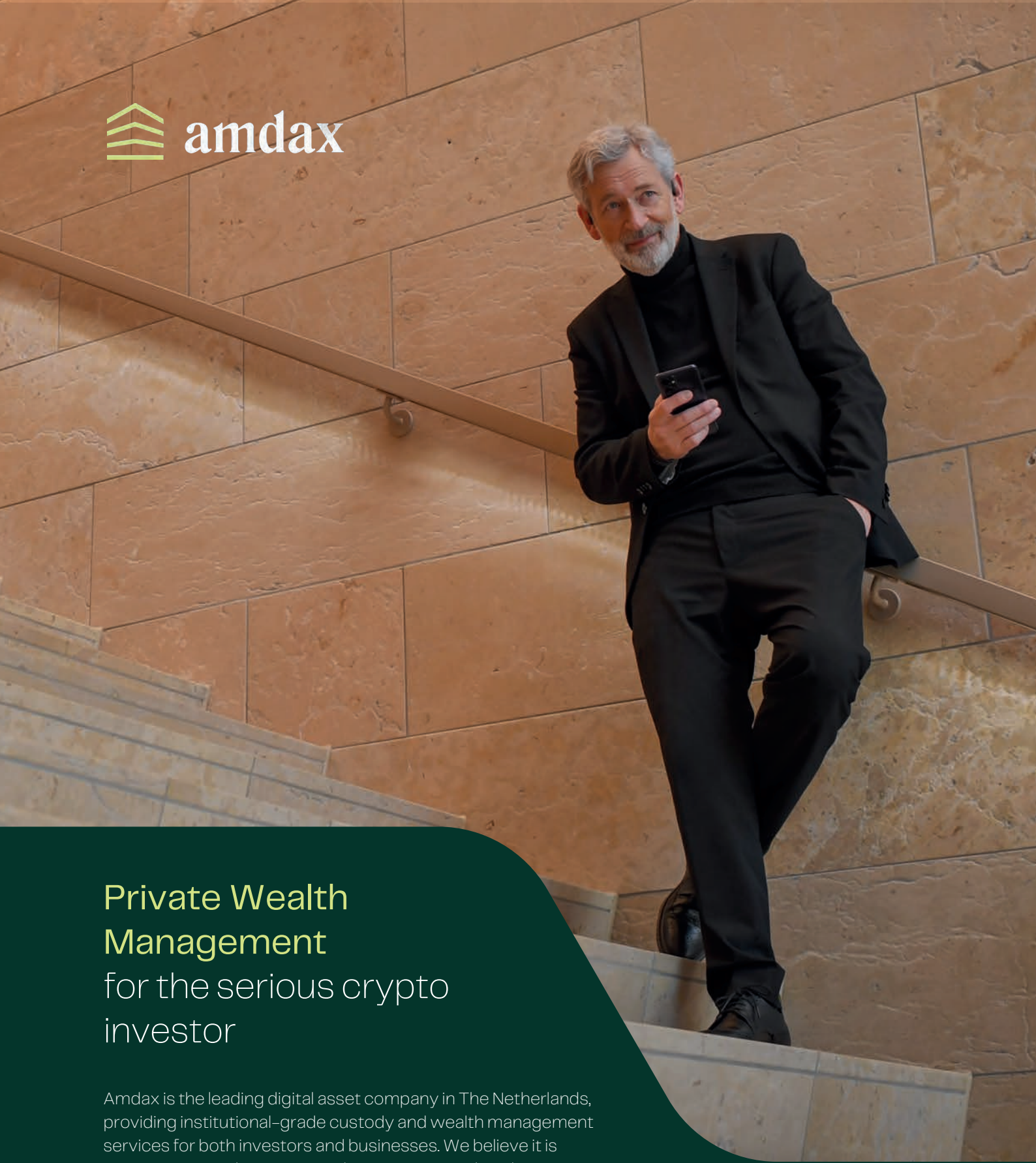

BNP PARIBAS
WEALTH MANAGEMENT
WINNER
INVESTMENT MANAGEMENT CATEGORIES
Real Estate Investment Proposition or Service
WealthBriefing MENA AWARDS 2023






BNY MELLON
WEALTH MANAGEMENT
WINNER
FAMILY OFFICE CATEGORIES (MENA)
Wealth Manager Servicing Family Offices
WealthBriefing MENA AWARDS 2023


CdR CAPITAL
WINNER
EAM CATEGORIES
Overall External Asset Manager
WealthBriefing MENA AWARDS 2023



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Private Wealth Management for the serious crypto investor

Amdax is the leading digital asset company in The Netherlands, providing institutional-grade custody and wealth management services for both investors and businesses. We believe it is important to guide investors when investing in digital assets. A personalised approach is our standard.

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7
Investment strategies

15+
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(NON-BANKING COMPANIES)
Client Reporting Solution
Most Innovative Overall
Fintech Solution














Deutsche Bank
WINNER
PRIVATE BANKING CATEGORIES
Private Bank Servicing
NRI/NRP Clients


RENOY KUNDUKULAM
FINMARK
CAPITAL LTD
WINNER
EAM CATEGORIES
CEO



ClearView Financial Media



PUBLICATIONS

WealthBriefing
News Insight Intelligence

WealthBriefing is the leading subscription-based business intelligence service for the wealth management community, with the latest news, analysis and in-depth features from around the globe. *WealthBriefing* subscribers are part of an international community for whom staying abreast of the latest industry developments is a crucial part of their professional practice. Readers find our content on topics such as strategy, M&A, important people moves, investment management and asset allocation to be an essential resource in a fast-moving world.

WealthBriefing*Asia*
Global Perspective, Regional Focus

The Asia-Pacific region's meteoric rise as a major wealth management market has sparked huge demand for region-specific business information. *WealthBriefingAsia* was launched in 2009 to satisfy this growing information requirement, and it is the only wealth management news site focusing exclusively on the Asia-Pacific region. Providing indispensable news, features and industry views that are always relevant and concise, *WealthBriefingAsia* allows subscribers to conserve that most precious of all resources: time.

FamilyWealthReport
North American Family Office Intelligence

The North American wealth management market is one of the largest and most diverse in the world, and is markedly different from those in Europe and the Asia-Pacific region. Multi and single family offices in particular are a well-entrenched,integral part of the private wealth management landscape. *Family Wealth Report* provides need to know business intelligence in a convenient and easy-to-read format – straight to subscribers' inboxes every day. Nowhere else will you find such high quality, in-depth and often exclusive content all in one place.

WEALTH MANAGEMENT AND PRIVATE CLIENT EVENTS AND AWARDS SERIES

A unique thought-leadership platform, *WealthBriefing's* events foster intellectual debate on the challenges and opportunities facing the industry and are designed to be an optimal use of wealth managers' precious time and present an excellent networking opportunity.

WealthBriefing has added to its offering for the global private banking and wealth management communities by running thirteen annual awards programmes for the family office, private banking, wealth management and private client communities. The awards programmes are 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

BESPOKE RESEARCH SERVICES

WealthBriefing has unrivalled access to the most senior wealth management professionals across the globe, meaning that our research reports represent guides to future best practice as much as being barometers of current industry trends.

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Empowering Female Leaders In The Middle East



Rasha Badawi
CEO
Barclays Private Bank MENA

Winner

- ***Leading Private Bank Chief Executive Officer***
- ***Leading Woman in Wealth Management***

As a global private bank, we operate in more than 40 countries and our collective focus is on making our clients feel more confident, more special and more inspired than if they banked or invested anywhere else.

We are entrusted in the primary global wealth hubs and corridors, providing comprehensive specialist investment, banking, lending and wealth advisory services to the world's most influential individuals and their families; alongside Trusts, Charities, and Family Offices.

How has your firm achieved this level of success?

Dubai is a key hub for our business – not only are we focused on being a partner of choice for global UHNWs and Family Offices in the region, but we are also committed to being a central hub for multiple wealth corridors.

I believe a key differentiator for us is our full-service offering and particularly our ability to draw on the breadth of skills and knowledge across the entire Barclays Group.

While we have access to the resources of a global bank, our dynamic operating model allows us to remain agile in local markets. We are a people business at heart – and having specialist teams on the ground in Dubai is hugely valued by our clients.

How do you measure success?

Speaking personally, being appointed CEO of Barclays Private Bank in the region a couple of years ago was undoubtedly a career highlight – it served as recognition and validation from peers and senior management that I am best placed to lead our business and team in the region. It is indeed one of the proudest moments so far in my professional life and is of course a key indicator of my success. Nonetheless, it's not my level of seniority that brings me the most joy. I'm inspired by a desire to grow within the Barclays Group and wider industry. This way, I can make a valuable contribution to our clients' lives and our business, as well as the communities we serve.

What do these awards mean to you, your business and your colleagues?

As a woman in the banking industry, this recognition means a great deal to me. It's a testament to the resilience and determination required to succeed in a traditionally male-dominated field, and I hope it serves to inspire other women.

However, I want to emphasise that these achievements wouldn't be possible without the incredible hard work and support of my dedicated colleagues. These are as much their awards as they are mine, and I am grateful for their exceptional efforts.

Accolades such as these acknowledge the relentless pursuit of our goals and signify the validation of industry peers and stakeholders, affirming that we are on the right path.

Moreover, they serve as a source of motivation, pushing us to continuously improve and set new benchmarks. They strengthen our reputation, build trust and open doors to new opportunities.

Ultimately, being honoured with these awards is a source of immense pride, reaffirming our commitment to deliver consistently excellent products and services while fostering a sense of accomplishment within our organisation.

BearBull
Global Investments Group



Your Legacy
Our Expertise

Founded by Pioneers - We continue to Serve Pioneers

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www.bearbull.ae

MENA Entrepreneurial Families Thrive With Our Swiss Institutional Expertise

Ahmad Saidali
Chief Executive Officer
BearBull Global Investments Group





Please explain why you think BearBull Global Investments Group has achieved a high level of success in the Middle East?

Our remarkable success in the highly competitive Middle East market is a direct result of our executive team's unparalleled institutional expertise and profound understanding of the MENA region. With over a century of collective experience in managing assets for sovereign wealth funds, Swiss pension funds, and entrepreneurial families, we stand out by providing personalised wealth advisory services that are typically exclusive to institutional clients. At BearBull Group, we take immense pride in delivering tailor-made solutions to our Multi-Family Office (MFO) clients, offering them cutting-edge solutions and bespoke services.

Our commitment to this level of service is reinforced by our unwavering dedication to transparency, a client-centric approach, and a performance-driven ethos. We also employ robust risk management techniques typically reserved for the most discerning global investors. Throughout this process, we rigorously adhere to strict compliance regulations and international standards, which are paramount in building trust and expanding our presence in the Middle East.

How does it benefit your clients?

Clients who partner with BearBull Global Investments Group benefit from the expertise of seasoned financial professionals who are vigilant in monitoring market dynamics, economic indicators, and geopolitical forces. Rather than simply promoting and selling products, our approach focuses on adapting investment strategies by anticipating or in response to these factors. Through our active wealth advisory philosophy, our firm is committed to delivering consistent returns by proactively adapting portfolios to match the ever-changing market landscape. We also prioritise safeguarding our clients' assets by employing active capital preservation techniques.

What are the main contributions you bring to the wealth management industry in the region?

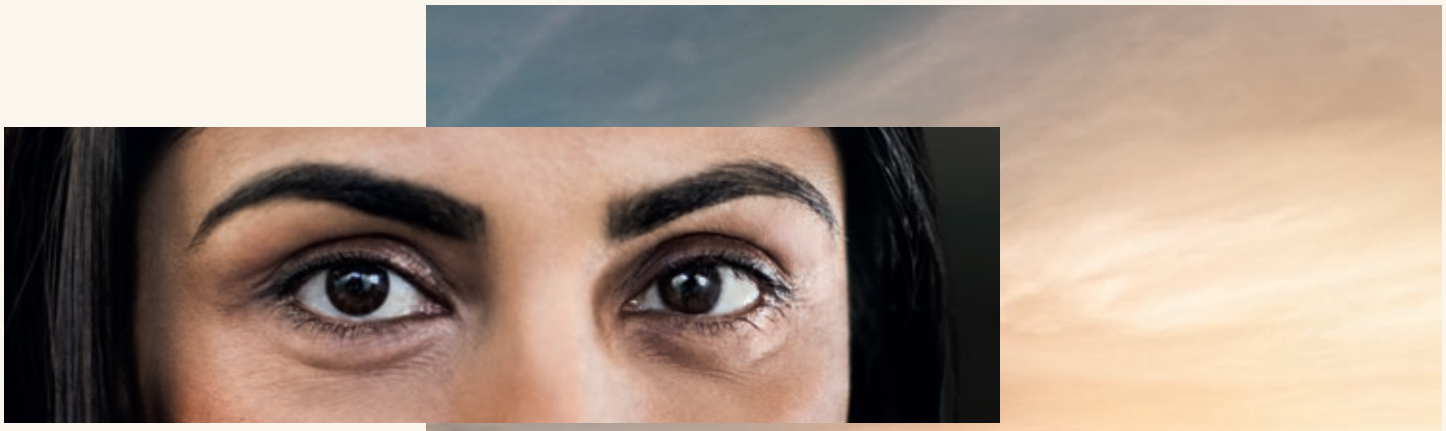
Beyond enhancing the sophistication and transparency of our client service, we have pioneered the first transparent benchmark suite tailored exclusively for private banking clients in the Middle East, referred to as the BearBull Private Banking Indices. These benchmarks are now widely embraced and are published monthly in the UAE, KSA, and Kuwait. Our principal aim in establishing these benchmarks is to empower regional investors with the means to objectively compare their portfolio returns. This initiative, in turn, enhances their investment decision-making process while championing transparency in the financial landscape.

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

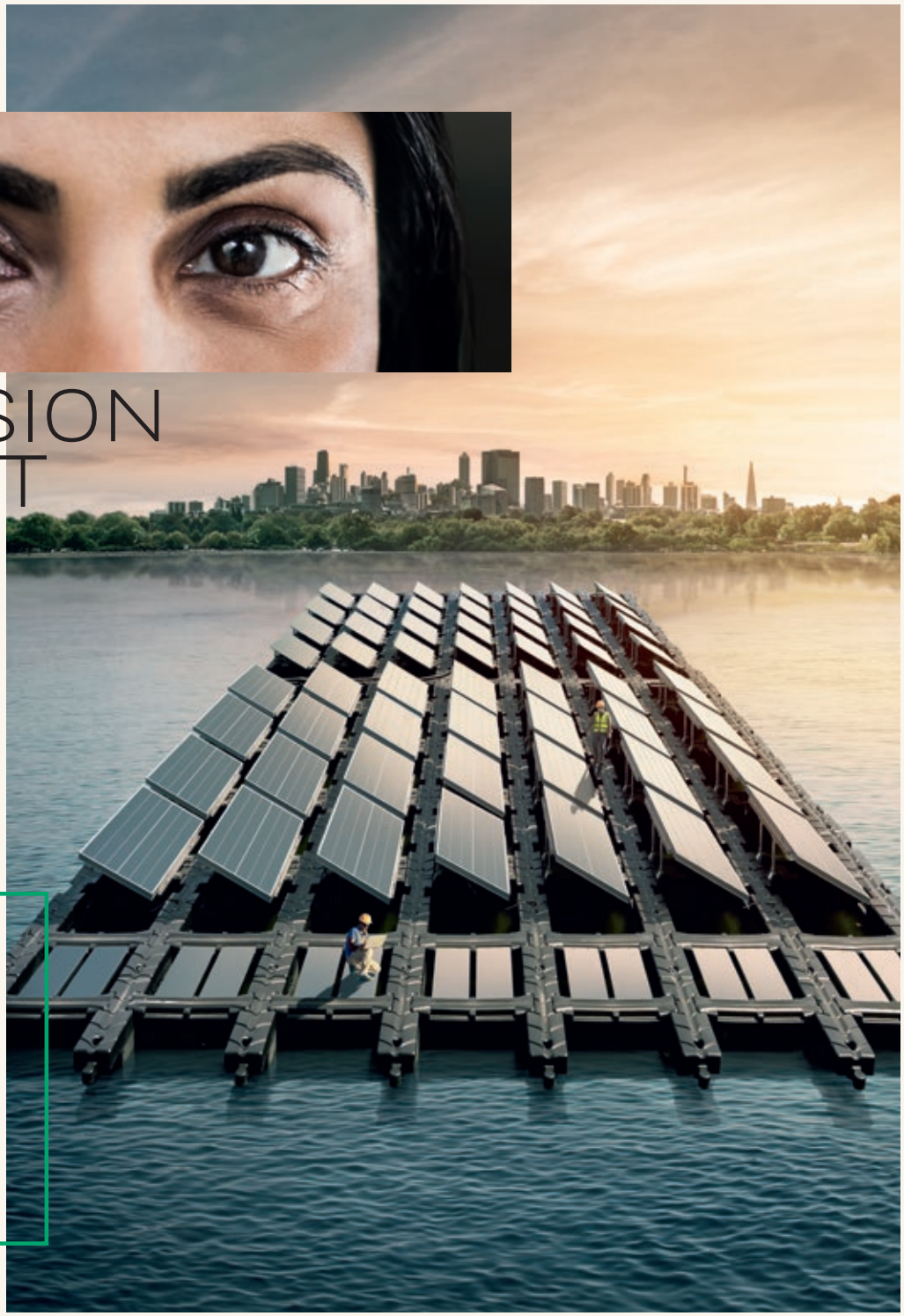
Accolades like these serve as a source of validation for our core mission: to be an unwaveringly client-centric firm, equipped with patient capital, and committed to prioritising our client's best interests above all else, free from any conflicts of interest. This achievement is not just our own; it is also a testament to the dedication and hard work of our colleagues, as well as the trust our clients have placed in us throughout our journey in the Middle East.

Can you sum up the philosophy that best describes your firm?

Our firm's philosophy is encapsulated in three key pillars: independence, which empowers us to make informed decisions without constraints; competence, which is the cornerstone of our offerings; and robust client relationships founded on trust and mutual respect.



TURN VISION INTO IMPACT



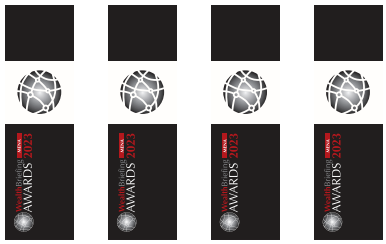
As an investor, you want to make a positive impact with your wealth. We offer innovative sustainable investment solutions across all asset classes so that you may align your wealth with what matters to you.

BNP PARIBAS
WEALTH MANAGEMENT

The bank for a changing world

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Continued Ambitions For Regional Growth Remain A Core Focus



Winner

- ***Real Estate Investment Proposition or Service***
- ***Private Bank - MENA Region***
- ***Private Bank - ESG Offering***
- ***Private Bank - Private Equity Offering***



Antoine Chemali
CEO
BNP Paribas Wealth Management

BNP Paribas Wealth Management is an award-winning leading private bank and is the largest private bank in the Eurozone providing solutions to clients across Europe, Asia and the Middle East.

In the Middle East, BNP Paribas Wealth Management is unique in its ability to leverage Group capabilities and in its engagement toward the region and the clients. Our team of experts personalise BNP Paribas Group's solutions to clients' unique needs.

Please explain why you think your firm has been able to achieve a high level of success?

We believe our success stems from a blend of client-focus approach, best-in-class expertise, values and outstanding team. Client-centricity is definitely at the heart of our organisation and we thrive at bringing tailor-made solutions to our clients that are unique to their needs.

To do so, we rely on our award-winning expertise and the strength not only of our Wealth Management division but also from the entire BNP Paribas Group. For example, we were able to finalise an important property investment deal in Europe for one of our strategic clients, thanks to our seamless collaboration with BNP Paribas Real Estate.

Our clients are also selecting us for our solidity, our excellent risk management and our ethos. Finally, our success is the success of our teams. We are honored by the talent of our team, their commitment, and their hard work.

What challenges have you had to surmount to get to this point?

In the highly competitive landscape of GCC's wealth management, especially in the UAE, the road to being recognised as a reference player is not without its challenges. First, the "One Bank" approach required extensive coordination and integration of diverse financial services, a complex undertaking that demands meticulous execution. Second, we have put in place a careful risk management and superior due diligence to protect our clients.

Yet, the most formidable challenge lays in building and maintaining strong client relationships. Earning trust and fostering enduring partnerships take dedication, attention and care. Overall, these challenges have been opportunities for growth and innovation, solidifying our position as a trusted leader in the industry.

Explain what benefits your firm and colleagues get from these awards?

Awards play an important role in the Wealth Management industry, signifying excellence, credibility and trustworthiness. They are testament of BNP Paribas' commitment to delivering exceptional service and achieving superior results. Most importantly, they provide assurance to both existing and potential clients of the strength of our platform. We consider these awards not just as recognition but also as driver to continue striving for excellence in serving our valued clients. It also supports our efforts to onboard the best talents of the industry.

What are your ambitions for the business?

Our ambitions in the region remain important as we aim to continue our double-digit growth for the years to come. More than financials, we want to remain the reference bank for entrepreneurs & families in the region. Also, BNP Paribas Group is recognised as a global leader in ESG & sustainable investing enabling us to accompany our clients in their respective impact journeys.

We are confident that thanks to our team's skills and dedication, we will further accelerate our growth and offer a superior experience to our existing and new clients in the future.

Our Global Family Office team collaborates with you so you and your families can prosper together.

Leverage the resources of one of the world's largest family office service providers. We offer experience and solutions that span all family office structures and growth stages.

Learn more about how we can serve your family office:
bnymellonwealth.com/globalfamilyoffice



BNY MELLON
WEALTH MANAGEMENT

A Legacy Of Client & Industry Trust



Shadi Alnasr
SVP Client Strategist
BNY Mellon Wealth Management

Winner

- ***Wealth Manager Servicing Family Offices***

Please explain why your firm has been able to achieve a high level of success?

BNY Mellon has been helping families build, manage, and preserve wealth for more than 230 years. The Global Family Office group, part of BNY Mellon Wealth Management, created over 50 years ago, is now one of the largest in the world, with more than 90 professionals focused exclusively on the complex needs of single-family offices and their advisors. Backed by the deep resources of BNY Mellon, our Global Family Office group is focused on delivering solutions and advice to help family offices and their advisors manage the complexities that exceptional wealth presents. Our boutique like service delivery and our fiduciary pedigree are often attributed as foundational reasons for our success. We listen to and partner with our clients to deliver highly tailored services for each family we work with. We pride ourselves on being consistent, creative, and exceptional, with an unwavering focus on our clients.

What challenges have you had to surmount to get to this point?

Over the past few years, the world as experienced a public health crisis, social tensions, technological disruptions, and economic turbulence, all of which were unseen in decades. To see how fast a virus has spread across the globe, impacting the global economy, we realise the speed at which change happens. We recognise that speed is challenging, it's dizzying and makes it difficult to maintain perspective. To that extent, the nature of managing family wealth is changing fast and to keep up with these changes, our clients need both expertise and proactivity. They are looking for proactive, trusted partners who are actively engaged in helping them flawlessly fulfill specific mandates for their family offices.

Drawing on over two centuries of serving families, we've learned that consistent steps in five disciplines are the keys to sustaining wealth: investing, borrowing, spending, managing costs and taxes, and protecting legacy. The impact of these disciplines is amplified in volatile markets, which is why we act on them with clients every year.

What has led to your firm's success and what role did your colleagues play?

Our client teams and resources are structured to provide the highest level of service. Working together with our client's family office and their advisors, consultants, and other investment professionals, we develop a deep understanding of each client's unique needs, circumstances, and account structures. With this knowledge, our teams can provide thoughtful and appropriate advice and solutions, and we become part of our client's control environment. This attention to detail and unwavering commitment to our clients has resulted in industry-leading client satisfaction.

Explain what benefits your firm and colleagues get from these awards.

Being recognised for our service to family offices is a testament of the well-executed strategy of our business by our teams all around the globe to adopt a more client centric culture, run our company better whilst holding up to a team culture. This award asserts the hard work put in by our teams across the globe and the trust our clients have put in us.

How and in what ways do you measure success?

At BNY Mellon, we put our clients at the center of what we do, we see them as more than a sum of their numbers and we offer more than technical expertise. We are a true partner to our clients. We have been vetted by the world's wealthiest families and have advanced the family office industry across geographies and generations.

It is only natural that success for us is the value we create for our clients and how satisfied they are with our services. To that extent, every year we do conduct a survey to obtain direct, quantifiable, and actionable information to help enhance our overall client satisfaction and loyalty. In 2022, our overall client satisfaction was at 90% and 85% of our clients were willing to recommend BNY Mellon to their network.

CdR CAPITAL

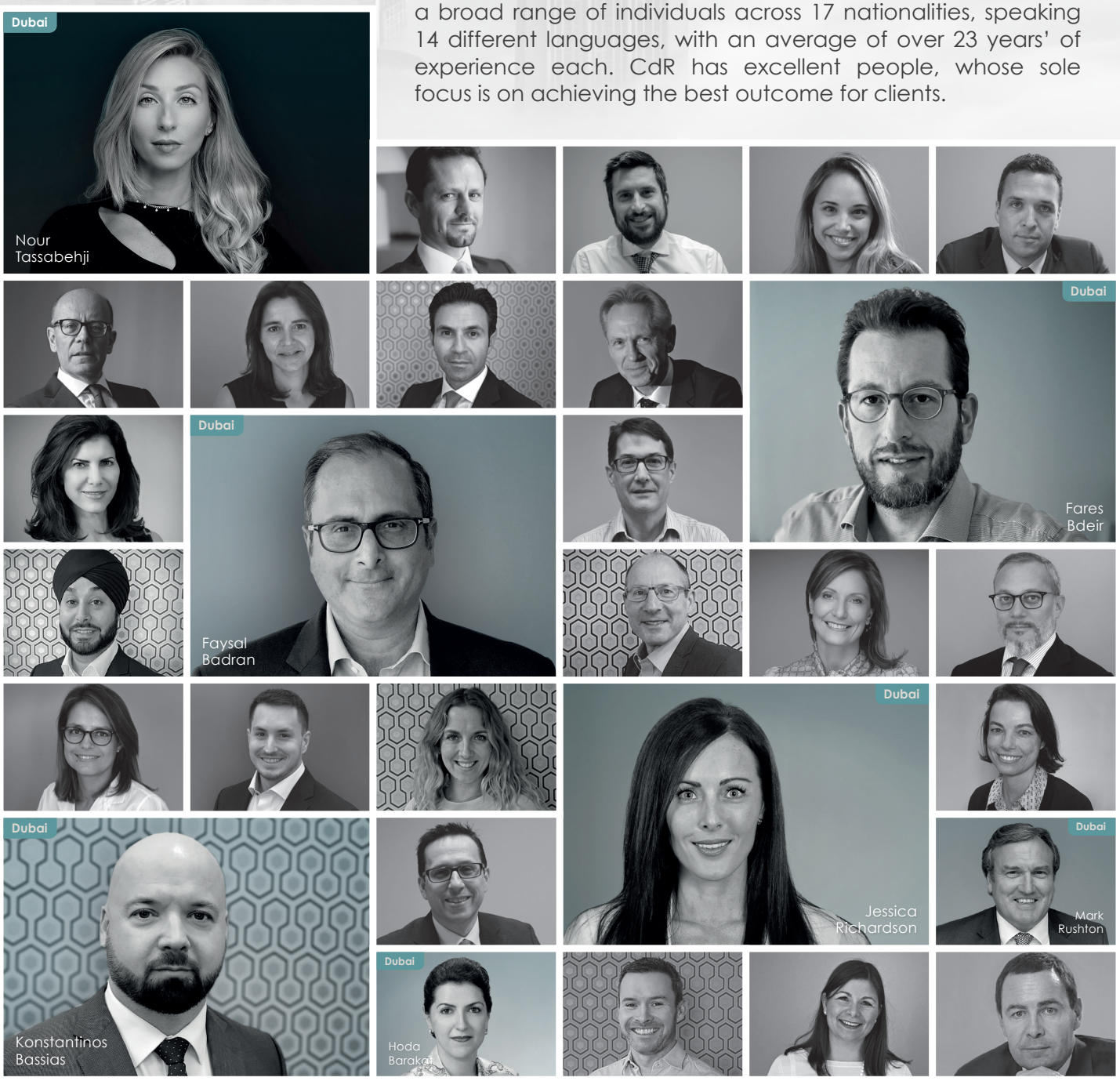
WealthBriefing MENA AWARDS 2023

WINNER
Overall External Asset Manager

CdR Capital Limited (CdR Dubai)

CdR is about people.

With 32 people across our 3 locations, we are proud to have a broad range of individuals across 17 nationalities, speaking 14 different languages, with an average of over 23 years' of experience each. CdR has excellent people, whose sole focus is on achieving the best outcome for clients.



Leading By Example.

CdR-Capital.com

GENEVA | LONDON | DUBAI

Success Through Recognising The Importance Of Client Needs

Winner

- ***Overall External Asset Manager***

CdR Capital



Please explain why you think our team has achieved a high level of success.

We believe in our people and the processes that we have put in place, both for idea generation as well as executing those ideas. We do the simple things well, the complex things really well! We have developed a robust investment process that allows us to build long term portfolios for clients that achieve their desired risk and return objectives, often from non-correlated sources of returns.

What challenges have you had to surmount to get to this point?

As independent wealth managers, CdR came into the market in the GCC well before others. This meant that there was a long education process for clients to understand the model of CdR versus being used to working exclusively private banks. Families are now familiar with fact that independent advisors can be complementary to the banks' service proposition, but this has taken time.

They now see that our independence aligns us more closely with our clients. Our success in the region has been mainly through word of mouth and client referrals. We are very happy that the EAM business is now growing so strongly in MENA - We welcome the competition! We have learned in Switzerland via the ASWM that, whilst we are all competitors, there is strength in numbers and as our market expands we can all win!

What has led to your firms success and what role did your colleagues play?

We make sure to lead by example in our industry when working with our clients, with other service providers and amongst ourselves as a team. Collegiality and intellectual rigor are our most powerful assets. From the investment side, we service individuals and families institutional client mind set and models.

We are a people business and our diverse, collective experience within the firm means that we can service the needs of all clients by working together as a team. That said, we have never been frightened to steer clients away from an asset class that we consider to be too speculative for their needs or the current market cycle.

Explain what benefits you and your colleagues get from these awards.

It is a great honour to be awarded best EAM in MENA, for which we are grateful to the selection committee. Any third party validation is helpful to a small business such as ours and hopefully explains our steady growth in client numbers during the past ten years.

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

We have offices in Geneva, London, and Dubai. At the start of our firm, over ten years ago our first clients insisted that we would build a presence in Dubai. We have been amazed that Dubai has since become far more than the gateway to the Middle East but is now home to international traders and investors, crypto communities, and Next Gen entrepreneurs.

What are your ambitions for the business?

We have been investing into and growing our presence across all of our offices given idiosyncratic opportunities which exist in Switzerland, London and the UAE. We have had success particularly in Dubai where our ambition is to keep attracting like-minded professionals who have both market knowledge and client experience. We talked about leading by example, and we want to be the example used in the region when talking about world-class independent investment advice.

COMARCH

Comprehensive suite of **IT solutions for the financial industry**



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Business Diversification Keeps Comarch Resistant To The Global Crises



Prem Drzymala
Executive Vice President of Global Sales EMEA
Comarch



Please explain why you think your firm has been able to achieve a high level of success?

Comarch's business philosophy remains firmly based on three pillars: product innovation, business diversification, and individual approach to customers. The company focuses on helping customers with digital transformation projects, building and delivering proprietary software only in selected business domains, trying to make them best-in-class by empowering with the use of domain knowledge and expertise. What made the company strong and resistant to global crises is business diversification – offering different products globally, addressing the needs of varying industries and diverse customers. Comarch carries out projects for the leading brands in the most important sectors of the economy, including among others Financial Services, Telecommunication, Trade and Services, Public Administration, and Healthcare. We're doing our best to bring the cutting-edge solutions for all of them, helping them to transform and build the competitive advantage.

What has led to your firm's success and what role did your colleagues play?

Building a high-class product that leverages the valuable experience previously gained in the area of capital markets such as AM, Custody, Brokerage, but also in the area of online and mobile banking. This would not be possible without the top-class specialists, not only in the area of programming, but also private banking, wealth management customer service, and other related processes. The end success results from the excellent work delivered by the team responsible for sales and after-sales services. Building such a team is of course the effect of the company's strategic long-term investment in R&D. To illustrate this, it should be mentioned that every year the company allocates over 15% of their revenues for investments in this field.

Explain what benefits your firm and colleagues get from these awards.

For us, it is primarily a confirmation of the highest product value and quality of the services we provide to our customers. It is also a networking event, an opportunity for inspiring conversations and meetings, to build and strengthen relationships, present our achievements, establishing new contacts, at the same time allowing for active strengthening of the company image of an expert as well building greater Comarch brand recognition.

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

Comarch operates in over 90 offices in more than 30 countries globally across six regions. The company Dubai office opened in 2001. The Middle East region is still strategically important for us – in 2019, we opened a new local Data Center in Dubai (operating alongside 14 others worldwide) to be able to provide cloud systems to our customers in the MENA region, and a new subsidiary in Riyadh.

How and in what ways do you measure success?

The first and the most important metric is customer satisfaction, resulting in customers' willingness to provide us with references; newly acquired customers, who are always a clear confirmation that we are a competitive business on the market; distinctions and awards received from organisations such as MENA *WealthBriefing*; product recognition by leading analytical companies such as Gartner or Celent; a growing number of clients regularly visiting us at our conference, Comarch User Group; and the number of applications from candidates willing to work at Comarch.

CRESTBRIDGE
FAMILY OFFICE SERVICES

TEN YEARS OF LOOKING AFTER TOMORROW

In 2023 we are celebrating our ten-year milestone

We are proud to have helped our clients achieve clarity and certainty whilst growing our team and global reach.

We're looking forward to building capabilities, creating opportunities and continuing our progressive, agile and client-focused approach.

Ten years and it's just the beginning.

Find out more from:

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daniel.channing@crestfos.com
T: +44 (0)7797 736326

Heather Tibbo
heather.tibbo@crestfos.com
T: +44 (0)7797 855672

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CRESTFOS.COM

Crestbridge Family Office Services Limited is a member of the Crestbridge Fiduciary Limited Affiliation regulated by the Jersey Financial Services Commission for trust company business and has its principal place of business at 47, Esplanade, St. Helier, Jersey JE1 OBD, Channel Islands.

None of the services referred to in this promotion are regulated services under the UK Financial Services and Markets Act 2000 (as amended).
*Cayman services are provided by and through Bridgestream who are regulated by the Cayman Islands Monetary Authority.
**Wyoming services are provided by Crestbridge Fiduciary, LLC, a joint venture between Crestbridge and Willow Street.

Independence And Agility Underpin Crestbridge Family Office Services' Client Proposition



Daniel Channing
Director and Board Member
Crestbridge Family Office Services

Winner

- ***Independent Trust or Fiduciary Company***

In an increasingly uncertain global environment, families are seeking clear, dependable guidance. We provide our clients with the strategies and service to meet their aspirations and long-term goals.

We achieve this through an in-depth understanding of the global marketplace and the ever-changing regulations shaping it. Working alongside clients and family offices we have successfully implemented effective structures and provided ongoing fiduciary services, contributing to a decade of consistent growth. Partnering with the top advisors to clients as well as the clients themselves brings a cohesive team approach to looking after the clients and family offices.

What is your firm's key difference in this competitive field?

As an independent, privately-owned business we offer the agility and responsiveness to react to changing situations.

Also, our deep understanding of the specific risks and complexities faced by Middle Eastern families allows us to bring a highly tailored approach to our service.

How important is a joined-up team approach to the business?

Attracting the best people means we can provide the best service. We offer a dynamic, rewarding environment where professional development is strongly encouraged. This helps us create a stable, supportive team where long term careers can be built.

Our culture matters to us, and is something we work hard to develop and protect. It helps bind us together, and work effectively across our offices and with external advisors. This enables us to provide a level of seamless client service that, we believe, speaks for itself.

What's next for Crestbridge Family Office Services?

2023 is a milestone for us, as we are celebrating our tenth anniversary. It gives us a chance to really look at what's driving families and to ensure we are reflecting this in our overall offer. Families are increasingly alive to the risks and opportunities of the current environment, and we believe we are strongly positioned to provide the support and expertise they require.

Deutsche Bank
Wealth Management

Deutsche Bank Wealth Management wins WealthBriefing MENA Award three years in a row

The Global South Asia (GSA) Wealth Management business at Deutsche Bank has established itself as one of the market leaders in serving the South Asian diaspora clients, enjoying very strong business momentum across its centres in Singapore, Hong Kong, Dubai, Geneva and London.

To find out more about how Deutsche Bank Wealth Management can help you, please visit deutschewealth.com

Winner of
WealthBriefing MENA Awards for Excellence 2023

WealthBriefing MENA AWARDS 2023
WINNER
Private Bank Servicing NRI/NRP Clients
Deutsche Bank AG

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Ten Years of Seamless Client Solutions For Deutsche Bank



Rajesh Mahadevan
Head of Private Bank for Global South Asia and Africa
Deutsche Bank AG



Winner

- ***Private Bank Servicing NRI/NRP Clients***

Please explain why you think your firm has been able to achieve a high level of success?

What sets apart the Deutsche Bank Global South Asia (GSA) business is our multi-country set up. Our clients have truly multi-jurisdictional complexities in their business and personal wealth management requirements. Our business has a global presence with 5 offices strategically located in major financial centers worldwide, as well as onshore India. This extensive office network, combined with Deutsche Bank's investment banking and corporate banking capabilities, creates a good value proposition for our clients.

Needless to say, the success of our business is mainly attributable to our long-standing, determined and committed team. In summary, our success is a testimony to our people, platform and our ability to offer bespoke financial solutions to our clients.

"Our success is a testimony to our people, platform and our ability to offer bespoke financial solutions to our clients."

What challenges have you had to surmount to get to this point?

The Deutsche Bank GSA business has been operating for over a decade. It has been built organically over the years with the founding principle of seamlessly offering client solutions both onshore in India and offshore. Throughout these years, the business has demonstrated resilience in the face of complex business and real-world challenges, including the most recent one by Covid-19.

Fast paced, tighter regulatory landscape changes, volatile markets and complex geo-political scenarios are some of the other challenges that the business has positively withstood over the years.

How and in what ways do you measure success?

To me success comes in many forms. I believe not everything is tangible. To this effect, I can vividly recall a quote by the noted Italian astronomer Galileo, 'measure what is measurable and make measurable what is not so'. To me, the wealth management business is a people's business and to this extent it cannot always be quantitative. Team spirit, camaraderie, partnership, client centricity, business values and ethics are some of the measures that to me truly reflect the success of our business.

"To me success comes in many forms. I believe not everything is tangible. To this effect, I can vividly recall a quote by the noted Italian astronomer Galileo, 'measure what is measurable and make measurable what is not so'."

What are your ambitions for the business?

The Deutsche Bank GSA business is distinctively positioned to service the Indian diaspora clients across their business and personal wealth requirements both onshore India and globally. While we have seen steady growth in our business over the years, I am most excited given the growth opportunity over the next decade. The regulatory landscape in India is changing and the extent of wealth generation among the diaspora client both onshore India and among NRI's has seen an extraordinary increase.

Given the number of tech unicorns in India with valuations topping over 300 billion USD, there is a new class of billionaires being minted. With a full suite bank both in India and offshore, Deutsche bank is extremely well positioned to serve our clients and grow in tandem with them.


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Finmark Renoy Kundukulam Leads By Example For The Work-Life Balance

Please explain why you think your firm has been able to achieve a high level of success?

FinMark team is a highly engaged team at work. We call ourselves a tribe, for a reason. Each member understands their roles and responsibilities and are quite demanding of each other in terms of work output. Each team member understands the vision and how their individual contribution adds to the overall objective of the firm.

There are regular interventions like annual townhalls, quarterly reviews, monthly coaching, weekly training, and ad hoc team building and team engagement activities that keep them motivated to exceed their goals. Thus, excelling in service delivery and curated timely advice is what makes FinMark highly successful.

What has led to your firm's success and what role did your colleagues play?

We have been able to become a profitable venture right in the first year of incorporation itself with no prior experience of having run businesses or having worked under the DFSA regulatory framework.

But being astute bankers, me and my team were able to quickly understand the key driving factors and focused on what really mattered. Be it putting in long hours, agile working, evaluating multiple options, holding each other accountable or even celebrating small wins; the team did it all!

Explain what benefits your firm and colleagues get from these awards.

First and foremost, it's a huge morale booster for all at FinMark. Secondly, it's a testimony to what we have been trying to establish and achieve. It's a reinforcement to what we believe and that it's a word of confidence that we are headed in the right direction. It's a mark of trust for our clients who do business with us.

From whom and what do you get inspiration? Where do you get your ideas?

I have always been passionate about creating and driving businesses even in organisations that I have worked as Business Heads. I cherish the fact that people identify the business success with key moments which were high points of achievements. That's my inspiration when I see people really achieve success and fulfil their own personal financial goals like buying a house etc.

I see myself as an HR Manager more than a CEO. What I mean by that is, for me my team's engagement and job fulfilment is one of the most important factors in driving the business because happy team members invariably result in happy customers. We tend to celebrate every possible opportunity be it a milestone achievement, or a big win for a particular staff, or celebrating Christmas party together or even congratulating a new-born in any of the team member's family!

"For me the work-life balance is not a real thing; because it makes 'work' look like the villain. To me work and life is intertwined."

For me the work-life balance is not a real thing; because it makes 'work' look like the villain. To me work and life is intertwined and therefore we have mid-year townhall meetings where we invite the family members for a staycation each year.

It gives an opportunity for the family members to see that their spouses are doing an important job at the firm, especially they feel very proud during the awards ceremony that we conduct during the townhall where we invite the spouse of the staff member who is the winner of the trophy!



Renoy Kundukulam
CEO
FinMark Capital Limited



gsb



World-class solutions for real-world wealth management

Because everyone should gain from a good investment

At GSB, we are dedicated to empowering all our stakeholders to achieve growth and success. Our team of experts provide sound and conscious investment strategy and advice that not only delivers consistent and sustainable returns, but also addresses real-world problems.

By investing with GSB, you are not only investing in your own future, but also in the future of our society and the world at large.

FINANCIAL PLANNING | LENDING | PRIVATE BANKING

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Financial Planning + Private Banking = Next Generation Client Solutions





Ross Whatnall, Group CEO & Founding Partner &
Alison Whatnall, Co-founder
GSB Capital



What is the background of GSB Capital?

GSB Capital (GSB) is an independent external asset manager and global wealth management company that has been in operation since 2021. It is regulated by both the Dubai Financial Services Authority (DFSA) and the United Kingdom Financial Conduct Authority (FCA).

Our clients receive comprehensive advice on all aspects of personal wealth management and private banking while we assist companies and structures in navigating increasingly complex planning.

Our mission is to create, protect and grow wealth in the most ethical, responsible and impactful ways possible. Our strong ethics, people, independence and comprehensive client proposition are the foundations of our success.

Why has GSB been able to achieve such a high level of success?

Integrity and transparency form the backbone of our business model. As a fee-based advice firm, we work on a holistic consultative basis, providing client-centric solutions alongside individual balance sheet management.

Our clients buy into this approach, knowing they can trust that we will always act in their best interests. This trusted advisor status is central to our culture, and it is something that we have been very successful in developing.

Located in DIFC and regulated by the DFSA, which aims to raise overall professionalism in the sector, GSB is known as a pioneer for higher industry standards, with feedback suggesting that we have already built an enviable reputation in this respect.

Holding a Category 3C license alongside the retail endorsement, we offer an unparalleled breadth and depth of solutions for our wealth management business for mass affluent clients and a class-leading private banking proposition for our HNW and UHNW clients.

Alternative investments are a focus for our private banking and family office clients. Our extensive network secures exclusive allocations to pre-IPO and private credit and equity opportunities, which our clients regard as a key differentiator.

How do we measure success?

The most significant indicator of success is the extent to which our existing clients and partners recommend our services to their networks and colleagues. At GSB, we are proud of our business's rapid organic growth, primarily attributed to referrals from satisfied clients.

We have worked closely with professional partners to enhance our offering and establish our brand as the preferred wealth advisory service provider. We are committed to maintaining our reputation as a trusted and reliable partner for all financial needs.

What are your ambitions for the business?

To continue to attract the best talent in financial planning and private banking. As thought leaders at the leading edge of wealth management, we will continue to push forward, building propositions, driving higher standards and delivering market-leading service.

In addition to the UAE, we will continue to scale our presence in the UK. More broadly, we are now looking towards the wider GCC region, Europe, USA and Asia as opportunities for further expansion.



YOUR TRUSTED FINANCIAL PARTNER IN THE UAE. AND BEYOND.

Whether you are a family navigating succession planning, setting up a Family Office or Fund in the region, an entrepreneur taking your first steps in the UAE, an e-commerce business navigating tax intricacies, or an established enterprise aiming for streamlined operations, our team is here to guide you.

Join hands with a team that's earned the respect and trust of the business and financial communities.

GTAG
Gulf Tax Accounting Group

GTAG Leading The Charge In Global Tax & Accounting Solutions



Bill Anderson
Chief Strategy Officer
Gulf Tax Accounting Group (GTAG)

Winner

- ***Accounting Provision for Servicing Private Clients***

Achieving High Levels of Success

At the heart of Gulf Tax Accounting Group (GTAG) lies an unwavering commitment to our clients. Our success is deeply rooted in our client-centric approach, ensuring that every service we offer simplifies and enhances their business operations.

"Our expertise in tax and accounting, combined with our digital-friendly infrastructure, has enabled us to manage an impressive client balance sheet exceeding $20 billion."

Our expertise in tax and accounting, combined with our digital-friendly infrastructure, has enabled us to manage an impressive client balance sheet exceeding $20 billion. This represents some of the region's most significant businesses, a testament to the trust and confidence they place in us.

Challenges Surmounted

Navigating the intricate landscape of global tax and accounting is no small feat. The regulatory environment is ever-evolving, and staying ahead requires constant vigilance and adaptability.

GTAG has faced challenges in ensuring that our services remain compliant with international standards while also being tailored to the unique needs of the MENA region. Our ability to adapt, innovate, and provide cost-effective solutions has been crucial in overcoming these challenges.

Factors Contributing to GTAG's Success

Our team is our greatest asset. Comprising internationally experienced partners, including ex-Big 4 members and Tier 2 professionals, our collective expertise spans various domains – from banking and auditing to entrepreneurship. This diverse background ensures that our advice is not just theoretical but grounded in real-world experience.

Our recent Joint Venture Accounting Partnership and the establishment of the region's first Tax Chamber further underscore our commitment to excellence and collaboration.

Ambitions for the Business

GTAG envisions a future where businesses, regardless of size or industry, have access to top-tier tax and accounting solutions that empower them to thrive on a global scale. As we continue to expand our services and reach, we aim to be the go-to partner for businesses seeking to navigate the complexities of global finance.

"GTAG envisions a future where businesses, regardless of size or industry, have access to top-tier tax and accounting solutions that empower them to thrive on a global scale."

Our recent foray into services like Family Office and Succession Planning Advisory, and our role as a registered CSP, are just the beginning. We are committed to continuous innovation, ensuring that GTAG remains at the forefront of global tax and accounting solutions.

Where in the World Do You Operate?

GTAG's primary operations are rooted in the MENA region, with our Dubai office serving as a strategic hub. However, our digital infrastructure caters to clients globally, ensuring they can manage their business affairs from anywhere in the world.

Whether assisting local entities or providing solutions to international clients, GTAG's presence is both domestic and global, bridging the gap between regional expertise and global best practices.

HABIB BANK AG ZURICH
PRIVATE BANK
SWITZERLAND | UAE - DIFC

A CLIENT CENTRIC APPROACH TO WEALTH PRESERVATION AND LEGACY PLANNING WITH PURPOSE

We distinguish ourselves with our legacy as a Swiss, family-owned commercial & private bank, serving clients across generations with our global presence

BESPOKE SOLUTIONS

Discretionary Portfolio Management
We offer global multi-and single-asset solutions for both traditional and Islamic investors.

Advisory Services
Global investment ideas and opportunities recommended in line with our house view. Our Active Advisory Desk engages clients with tactical and thematic ideas, based on market opportunities.

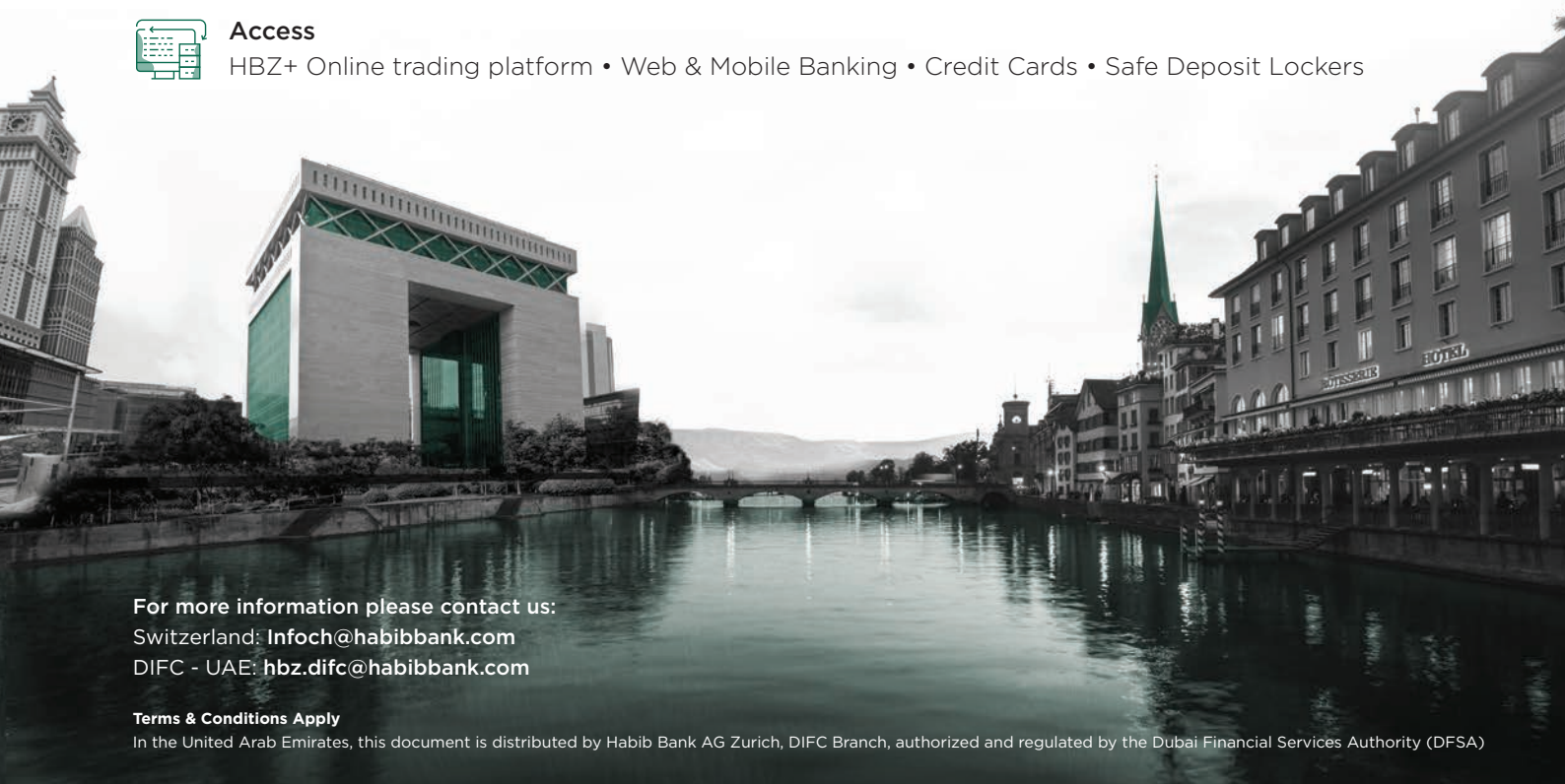
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Tailor-made solutions for our clients' succession planning and wealth structuring needs.
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Habib Bank AG Zurich's Swiss Legacy Stems Success



Salman Haider
Chief Executive Officer,
Group Wealth Management
Habib Bank AG Zurich

Winner

- ***Most Promising New Private Bank Proposition***

Please explain why you think your firm has been able to achieve a high level of success?

Habib Bank AG Zurich's success stems from a combination of factors. Firstly, we distinguish ourselves with our legacy as a Swiss family owned Commercial, Retail & Private Bank, serving our clients across generations with our global presence.

Our unwavering commitment to understanding and meeting the unique needs of our clients has been a cornerstone of our success – which is led by our presence in all our key markets and banking clients for their commercial, retail, Islamic and WM needs.

Additionally, the expertise and innovative approach of our team to wealth management has allowed us to compete successfully in a dynamic and competitive industry. This combination of heritage, client-centric focus, and forward-thinking strategies has been instrumental in our journey to success and will remain so going forward.

What has led to your firm's success and what role did your colleagues play?

Habib Bank AG Zurich boasts an established client base across its key products and services, working with many wealthy clients and families and their businesses, and with strong multi-generational connectivity.

We have worked with our clients in the past on corporate banking or trade finance largely, this operation represents a new avenue to work with them for their wealth needs.

Our success is a collective achievement. The dedication, expertise, and collaborative spirit of our colleagues have been instrumental. Their commitment to excellence, client satisfaction, and innovative thinking creates a dynamic environment that fosters success.

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

Habib Bank AG Zurich's roots are firmly planted in Zurich; the Bank has strategically expanded its footprint internationally. Our global footprint enables us to deliver a wide range of solutions and access emerging markets, offering our clients a holistic approach to wealth management.

Habib Bank AG Zurich has branch operations in Kenya and the UAE, while our subsidiaries are strategically located in Canada, Hong Kong, the UK, Pakistan, and South Africa.

The Private Banking operations are situated in Zurich and the Dubai International Financial Center in Dubai. This strategic distribution enhances our ability to serve our clients with tailored financial solutions.

How and in what ways do you measure success?

Success for us goes beyond financial metrics. We measure our success by the long-term relationships we build with our clients, client satisfaction, and our ability to adapt to evolving market trends.

Sustainable growth, ethical practices, and positive client experiences are key indicators of our success.

HOURANI

Our award-winning Private Wealth and Family Offices Team advise on a range of private client and wealth management mandates including:

- Asset Protection
- Estate & Succession Planning
- Family Governance
- Family Charters & Family Constitutions
- Charity and Philanthrophy
- Shari'a Compliant Sucession Planning
- Wills & Probate
- Family Dispute Resolution
- Establishing Family Offices
- Optimizing Legal Structures

> "This very experienced team is a well-known name in the market."
>
> **Chambers Global**

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Partner
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Estate Planning For The New Age Middle Eastern Business Family





Chadi Hourani, Partner &
Sunita Singh-Dalal, Partner
Hourani & Partners

Winner

- ***Estate Planning Service***

Please explain why you think your firm has been able to achieve a high level of success

Hourani and Partners was established 48 years ago in the UAE and is a well-established independent regional law firm. Being clearly positioned in a niche practice area in the fast developing region of the Middle East, has enabled us to succeed in providing our clients, the majority of whom are regional Family Businesses, with optimal, regional estate and succession planning advisory services.

We are well versed with the local laws, regulations and business practices and are acutely aware of key cultural and religious considerations, that are crucial to the success of a well-established, robust estate and succession plan.

We have carefully curated bespoke Family Governance Frameworks for leading Business Families in the Kingdom of Saudi Arabia and the United Arab Emirates and assisted them in safeguarding their local ancestral wealth with robust and optimal estate and succession plans.

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

We operate from our headquarters in the UAE, but advise clients based across the Middle East and Southwest Asia. We also advise international Business Families who own significant portfolios of assets in the Middle East. We also offices in Lebanon, Turkey and North America and ZH Partners is our relationship firm in Saudi Arabia (Riadh, Jeddah and Khobar).

What are your ambitions for the business?

We aspire to be the leading Private Wealth and Family Office Advisers in the Middle East. Given our deep-rooted experience of advising families across the GCC, especially in The Kingdom of Saudi Arabia and the United Arab Emirates, we aspire to be able to provide all families with well-defined estate and succession planning solutions, efficient and sustainable governance frameworks and successful Family offices.

We are keen to continue to advise governments across the Middle East in relation to creating successful financial centres providing robust estate planning and wealth management solutions to families in the region, which shall in effect consolidate regional wealth and create a truly competitive wealth management ecosystem in the Middle East.

If there is one thing you would like to change about the wealth management industry, what would it be?

We would like to see more senior professional advisers joining the regional wealth management industry, thereby ensuring that clients receive qualitative advice and assistance from skilled, qualified professionals on matters within their respective jurisdictions.

Provided professional advisers adopt a collaborative approach to their advisory services, global business families shall always receive optimal, unconflicted advice in each jurisdiction from expert advisers.

intellectAI

A revolutionary wealth ecosystem to empower your Relationship Manager

Hyper Automation + Hyper Personalization = Modern Experience

DIY Paperless Account Opening	Time Series & Factor Analysis	Customized Recommendations
Virtual & Interactive Advisory	ESG and Sentiment Analysis	Smart Portfolio Health Check
Customer Engagement Indicator	AI & Data Evidenced Nudges	Sustainable Investment Monitoring

Powered by eMACH technology

30% gain	**80% gain**	**40% gain**	**30% gain**
Operational Efficiency	Portfolio Review Time	Relationship Manager to Customer ratio	Customer Base YoY

Disclaimer - these are some measured customer statistics. Your results may vary.

Awards and Recognitions

AiteNovarica | Gartner | WealthBriefingAsia

We would be happy to schedule a call for your team and you

To know more contact, Anand Rai | 971 585720306 | anand.rai@intellectdesign.com

Revitalising Wealth Management With IntellectAI: The AI Frontier



Vinay Kumar
Product Head
IntellectAI

Winner

- ***Innovative Use of Artificial Intelligence***

In the complex financial world of today, Artificial Intelligence (AI) has emerged as the transformative technology reshaping wealth management. It's a pivotal shift, where AI's integration isn't merely an opportunity to upgrade the existing systems but bring about fundamental transformation. Traditional approaches are making way for AI-driven solutions which are characterised by enhanced efficiency, precision, and a high degree of personalisation. The ability of AI to distill insights from vast data sets isn't merely an advancement; it's now a cornerstone for maintaining competitive relevance.

Take for example, what AI powered prospect and opportunity management can do. AI can suggest which customers are more likely to invest into a given product because it is a better fit given the customer profile and investment objectives. Relationship Managers are likely to save hundreds of hours wasted on low potential outcomes. Or extend this case to AI-driven portfolio selection. While the customer is drowning in the information deluge, AI can curate the information for each customer taking into account his current portfolio and areas of interest, it can create a personalised client communication by extracting and summarising long research reports and news articles. These are some of the use cases which we categorise under hyper personalisation capabilities of AI. Its ability to tailor services to both high-net-worth and retail clients offers a level of personalisation previously unattainable.

While IntellectAI's solutions are continuously evolving, their potential to redefine the wealth management landscape is clear. At IntellectAI, our effort is to transcend the current boundaries of wealth management. We're not just leveraging AI; we're reimagining its role across every facet of the industry. From deepening client engagement to refining investment strategies, our goal is to infuse AI's capabilities in a manner that's ethically sound, transparent, and centered on our clients. We envision AI as a force multiplier, augmenting human expertise with unparalleled computational power and insight.

The path to integrating AI in wealth management business, however, has many layers of challenges. Data privacy, the complexity of implementation, explainability of the outcome, and the necessity for continual adaptation stand out among those. Our approach addresses these challenges with robust data protection measures, deployment of tools for smooth integration with the existing ecosystem of applications, and a commitment to support innovation and adaptability within client organisations.

It is clearly visible on the horizon that the future of wealth management shall be heavily influenced by AI innovations. We anticipate that in the wealth management business AI would not only complement human advisors but also bring the end customer and the investor to the forefront, proactively addressing client needs and adapting to market changes faster than ever before. At IntellectAI, our commitment is not just to adapt to this future but to be the catalysts for its arrival. We're dedicated to ensuring that our clients and their end-users fully benefit from the transformative power of AI-driven wealth management.

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Jersey Finance

Delivering Insight ▪ Driving Innovation



Jersey

The International Finance Centre

Jersey is one of the world's leading international finance centres. Its forward-thinking approach, robust regulatory framework and political and economic stability have kept the jurisdiction at the forefront of global finance for more than 60 years.

Attracting the brightest talent and with an impressive range of products and services, Jersey gives an unparalleled welcome to businesses and investors alike.

Jersey Finance is proud to host a range of leading events and webinars in financial services, both locally and internationally, and to participate in many others.

To find out more about our work in the MENA region, please contact:



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Director - Middle East, Africa and India
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T: +971 (0)50 384 8277
jsy.fi/faizal

For further information, please visit :
www.jerseyfinance.je or call +44 (0)1534 836000

60+years
at the forefront of global finance, with a wide range of products and services

Supportive
Jersey has strong ties with the Gulf region, with a regional office established in the DIFC in 2018 and a presence in the UAE since 2011

Substance
Jersey has a modern business environment with almost 14,000 professionals supported by a politically stable government

Regulatory framework
Jersey's regulatory framework is built around governance, tax transparency, and compliance

Jersey Finance Triumphs For The Seventh Year



Jersey Finance

Winner

- ***International Financial Centre (IFC)***

Please explain why you think your firm has been able to achieve a high level of success?

For more than 60 years, Jersey's international finance centre (IFC) has built its reputation as a jurisdiction of choice for those seeking secure, efficient, and responsible global investments. Globally recognised, a combination of factors set Jersey apart from other IFCs: its political and economic stability, sophisticated legal infrastructure, robust regulatory framework and range of products and services, delivered by some 14,000 skilled finance professionals. This blend of factors positions Jersey at the forefront of financial services, ensuring our ability to meet the diverse needs of individuals, businesses, financial intermediaries and more.

What challenges have you had to surmount to get to this point?

Over the past year, in the face of challenges brought by inflation, geopolitical tensions, social unrest, and political pushback on previously made net zero commitments, Jersey's forward-thinking IFC has stepped up its focus on resilience, connectivity, stability and sustainability. These are all qualities that have resonated well with the MENA and wider international investor community, and we will continue to build on these themes heading into 2024, backed up by a focus on digital innovation, sustainable finance, global connectivity, and upskilling.

What has led to your firm's success and what role did your colleagues play?

Despite its geographical size, nine by five miles, the impact of Jersey's IFC around the globe is substantial. Supported by the work of Jersey Finance to champion the competitive position of the Island's finance industry, both locally and internationally, Jersey's diversified global reach is a major differentiator – more than 50% of new business in Jersey emanates from markets beyond Europe. Representatives in our Middle East Regional Hub office in the DIFC deliver an active engagement programme in the region. This year, our activities stretched from hosting our annual Dubai conference, to relationship building in Africa.

Explain what benefits your firm and colleagues get from these awards.

It's an honour to be recognised for our work throughout the MENA region for the seventh consecutive year. Jersey Finance takes pride in our substantial ties and valuable relationships with the MENA region, underpinned by Jersey's stability, high regulatory standards, and specialist workforce.

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

We have a presence in Jersey, Dubai, Hong Kong SAR, Johannesburg, London, New York, Shanghai, and Singapore.

How and in what ways do you measure success?

Jersey's world-class reputation as a leading IFC has been endorsed by independent bodies and institutions of the highest standards. In the past five years, Jersey has won 19 national and international awards. Our reputation and regulation is acknowledged by independent assessments from some of the world's leading bodies, including the OECD, IMF and The World Bank.

Jersey Finance has a strong tradition of producing evidence-based research. Through research, we bring new insights to the market and ultimately help drive positive change, based on facts. Recently, we worked closely with the Centre for Economics and Business Research (Cebr), to analyse the full extent of Jersey's global economic footprint and our contribution to so-called 'global value chains' via GDP, employment, and wages. The report found that Jersey's combined financial services sector manages and services a total of £1.44 tn of capital around the world; supports more than £170 bn of global GDP each year; sustains 5.1 m jobs worldwide; and supports £73 bn in associated wages of ordinary people, in all corners of the globe.

Hand in hand, we deliver excellence.

Explore best-in-class investment opportunities and tailored solutions with a team driven to help you reach new heights. We strive to ensure stability no matter the conditions.

When it comes to our clients, it's personal.



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Hand In Hand, We Deliver Excellence. Your Partner In Wealth Creation



Mohammad Alsmaiee
Manager - Wealth Management and Business Development
Kuwait Financial Centre "Markaz"

Winner

- ***Private Bank or Wealth Manager Servicing The State of Kuwait***

Our achievements are a testament to the solid foundation and extensive experience we have constructed over the past five decades. Kuwait Financial Centre "Markaz", established in 1974, represents a synthesis of tradition and innovation, operating as one of the region's leading Asset Management and Investment Banking Institutions. We pride ourselves on offering bespoke advisory services, crafting diversified investment portfolios and funds, and achieving a footprint across 13 countries. Managing almost USD 4 bn in assets, Markaz has become synonymous with excellence in financial stewardship.

Our success is also rooted in the breadth of our offerings, which encompass Asset Management, Investment Banking, Real Estate Investment, Wealth Management, and Research. These are bolstered by our robust investment research capabilities, which empower more informed decision -making, and strategic partnerships that enhance our operational strategies on a global scale. We must also acknowledge the highly competent teams across Markaz who are the backbone of the company, and have made this success possible today.

The success of Markaz is a tapestry woven with the threads of innovative solutions and an unwavering dedication to client success. Our team members are the artisans of this tapestry, possessing a blend of expertise and a commendable track record that has been acknowledged through various awards and recognitions over the years. Each member of our team contributes by crafting solutions grounded in deep market research, nurturing strong relationships that place client needs at the forefront, working tirelessly to deliver unparalleled services.

These awards are not just accolades but also serve as a testament to our firm's reputation, reinforcing our standing in the industry while simultaneously motivating our team to reach even greater heights.

Markaz has established a strong presence that transcends borders, reflecting our capability to adapt and excel both locally and internationally. While we possess a robust positioning locally and in the region, our strategic operations also extend to the US and Europe, where we collaborate with sector-focused partners. Furthermore, our international reach is amplified through partnerships with institutions around the world to market our diverse solutions, attesting to our dynamic and expansive operational landscape.

We have offices in the UAE and Saudi Arabia, along with a research subsidiary in India.

Inspiration for Markaz is drawn from a wellspring of sources, which include the rich legacy of our firm's achievements, the zeal of our diverse team, and our unwavering commitment to achieving excellence.

Our team is a fusion of founding members and emerging talent, providing a dynamic synergy of experience and innovation. We are constantly inspired by our history, yet we remain forward-thinking, always striving to learn and improve.

Our solutions are borne out of a dedication to meeting evolving client needs and developing a proactive stance in navigating the fluidity of markets and industry trends. It's within this ecosystem of knowledge, ambition, and adaptability that we find our greatest ideas and drive for success.



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LGT Private Banking

LGT (Middle East) Ltd. in the Dubai International Financial Centre (Registered No. 1308) is regulated by the Dubai Financial Services Authority (DFSA). Related financial products or services are only available to Professional Clients, as defined by the Dubai Financial Services Authority.

A Unique Alignment Of Interests



Sebastian Goeres
SEO
LGT Private Banking Middle East

Winner

- ***Pure Play Private Bank***
- ***Private Bank – Philanthropy Offering***

Please explain why you think your firm has been able to achieve a high level of success?

LGT Private Banking is managed by a family that has lived entrepreneurial values for generations. At the same time, the family itself is a client of the bank. This creates a unique alignment of interests between LGT and our clients, fostering long-term loyalty and trust. This has undoubtedly contributed to our success story.

It goes without saying that success depends on many factors. In my experience, a strong business model is crucial. Ours is based on a focused strategy, a diversified client base and deep, differentiated competencies. Our strong focus on alternative investments is a good example of this: Our owner family has invested their own assets in private equity, private debt, and other private market investments at a very early stage. As a result, we have built up many years of experience and expertise in this area, which also benefits our clients.

Another important pillar of our success is strong management, ensuring the execution of our business plans, setting the right strategic priorities, and continuously developing the business model itself.

What challenges have you had to face to get to this point?

One of the biggest challenges was undoubtedly the financial crisis, which for a long time affected not only our industry but the whole world. Thanks to our sound financial stability and long-term strategy, however, we've never operated at a loss. And we are very pleased that, despite the difficult political and economic environment of the past couple of years, we have been able to make good progress and achieve good results, both for ourselves and for our clients. The long-term thinking of our owner, the Princely Family of Liechtenstein clearly helps in navigating the different cycles.

Of course, increasing regulatory complexity is also a challenge for the financial sector. This makes it all the more important to have efficient processes – as well as skilled and motivated people with the relevant expertise and experience.

Explain what benefits your firm and colleagues get from these awards.

Our efforts are being recognised by reputable external bodies. These awards encourage us to continue our path, to remain true to our values and principles – and they motivate us as they confirm our expertise, commitment, and competence. An even greater honour, of course, is the trust of our clients, who have entrusted us with their assets for generations.

"These awards encourage us to continue our path, to remain true to our values and principles – and they motivate us as they confirm our expertise, commitment, and competence."

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

LGT has its roots in Liechtenstein, Europe. Today, however, we are a leading international private banking and asset management group with over 5000 colleagues working out of more than 25 locations worldwide. For more than ten years now, we have been expanding significantly in the Middle East – and our growth continues. In recent years, we've expanded our offering in India, Japan, and Australia. This is part of LGT's long-term international strategy, which is fully supported by our owner.



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Lombard Odier: A Firm Commitment To The Middle East



Arnaud Leclercq
Chairman and Partner
Lombard Odier Middle East

Winner

- ***Overall International Private Bank (HQ Outside MENA Region)***
- ***Shariah-Compliant Wealth Management Offering***

We are honoured to win the awards for best 'Overall International Private Bank' and best 'Shariah-Compliant Wealth Management Offering' for the second consecutive year. Both firmly underscore our commitment to the MENA region and our capacity to deliver truly bespoke wealth solutions for our clients.

Lombard Odier is a Swiss private bank and investment specialist with deep roots in the Middle East. We have been servicing HNWI in the region for 50 years. Today, our dedicated Middle East team offers bespoke banking and investment solutions from offices in Dubai and Abu Dhabi.

Our mission is to grow and preserve our clients' wealth across generations in a rapidly changing world and accompany them throughout their lives in both their personal and business affairs.

Please explain why you think your firm has been able to achieve a high level of success?

We are seeing HNW investors in the region increasingly looking to consolidate their wealth across fewer banking partners that can deliver more in terms of client service and access to the best global investment opportunities. Thanks to our local presence and global investment expertise, we can offer clients the benefits of both scale and a highly personalised client service.

Stability is also core to our appeal in the region. Lombard Odier is the oldest private bank in Geneva and one of the best capitalised in Europe with the highest Fitch rating for a bank of our size.

What has led to your firm's success in the region?

We are finding that interest for Islamic investments is as high among younger HNW investors in the region as their older counterparts. We are therefore seeing increasing demand for our investment solutions managed in line with the principles of Islamic finance, which we have offered to our clients for a decade. Our Shariah-compliant discretionary mandate falls within our long tradition of social responsibility and a commitment to developing sustainable and responsible investment solutions.

Our research also shows that investors are increasingly looking to invest sustainably. We offer clients a broad range of high-conviction sustainability and impact portfolios across asset classes. We also offer a ground-breaking Shariah-compliant ESG equity portfolio for Islamic investors that want to drive positive change.

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

Our roots lie in Switzerland, but our vision is international, serving our clients from 25 offices, including Dubai and Abu Dhabi, and 10 booking centres globally.

In 2019, Lombard Odier was the first Swiss private bank to receive a license to operate at the Abu Dhabi Global Market. As of September 2023, the Bank also has a licence from the Dubai International Financial Centre (DIFC) and our current office in Dubai will be replaced by a new subsidiary at the heart of the DIFC.

WealthBriefing MENA AWARDS 2023

2ND CONSECUTIVE YEAR

BEST IN FAMILY OFFICE ADVISORY OFFERING

M/HQ

2ND CONSECUTIVE YEAR

BEST IN FOUNDATION CREATION

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The Ultimate Private Wealth Optimisation Platform



Yann Mrazek
Managing Partner
M/HQ

Winner

- ***Family Office Advisory Offering***
- ***Foundation Creation***

Please explain why you think your firm has been able to achieve a high level of success?

Our business encapsulates a distinctive and unparalleled proposition within the Middle East. We seamlessly integrate the specialised expertise of a private client law firm with the dynamic capabilities of a market leading fiduciary platform, all converging under a single unified banner.

With a portfolio comprising over 610 Single Family Offices (SFO/s), Private investment companies (PICs) and family holding verticals under our administration, our reputation as the quintessential private client firm has been solidified over a decade. Our unwavering commitment to excellence has consistently propelled us to the pinnacle of recognition, consistently earning us the coveted status of a tier 1 private client and structuring firm.

Our collaborative journey intertwines closely with families in the midst of contemplating or having already established, a single -family office (SFO) or holding vertical/s. Our mission is clear: to meticulously organise, protect, and preserve family assets while implementing innovative intergenerational wealth transfer strategies and vehicles.

What sets us apart is our unparalleled experience and deep-rooted local practical knowledge in structuring SFOs in the dynamic landscapes of ADGM and DIFC. This ensures that the solutions we craft are not just theoretical but deeply rooted in the local context, aligning perfectly with our clients' needs.

Our expertise goes beyond the establishment phase. Families frequently seek our counsel to review existing family structures and operations, a testament to the trust they place in our capabilities. Our guidance is instrumental in identifying opportunities for improvement, enhancing efficiency, and ensuring long-term success. We are also providing outsourced support services to the SFOs/PICs we have helped with the registration of.

What challenges have you had to surmount to get to this point?

The Regulatory framework had to be built and requires constant curating to remain locally relevant and internationally competitive. Today, it is both. Over the years, the UAE has introduced an array of innovative wealth management tools aimed at families. The breakthrough DIFC Trust; Foundation regimes in ADGM, DIFC and later RAK ICC; Special purpose vehicle regime, Prescribed Company regime, as well as Fund regimes all contributed to making the DIFC and the ADGM globally recognised wealth management centres.

What role has your firm played in this constant evolution?

Having spearheaded lobbying and educational efforts that resulted in the introduction of foundations in the region - and currently supporting 240 of the total 701 active ADGM/DIFC foundations, a 35% market share – we are deeply committed to proactively educating the market, a mission that encompasses our clients, peers, and governmental bodies.

Furthermore, we maintain an unwavering commitment to staying abreast of the latest developments in the private client and related sectors. We publish newsflashes and fact sheets on a weekly basis, delivering up-to-the-minute information about local legislation and other pertinent subjects to our clients and industry peers. Our latest initiative consists in a survey aiming at highlighting the 'final frontier' in terms of structure optimisation using domestic structures: lending, and the challenges and opportunities that lay ahead!

Explain what benefits your firm and colleagues get from these awards.

Receiving the *WealthBriefing* MENA *'Family Office Advisory Offering'* firm of the year and *'Foundation Creation'* firm of the year 2023 for two consecutive years is a fantastic acknowledgment for our team, which takes pride in continually expanding its knowledge and is dedicated to providing added value to clients.


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WINNER
EAM CATEGORIES
AuM up to US$ 1 Billion
Leading Female Executive
ALISON WHATNALL
MENA
2023


GTAG
Gulf Tax Accounting Group
WINNER
PRIVATE CLIENT/
CONSULTANCY CATEGORIES
Accounting Provision for
Servicing Private Clients
Briefing MENA
RDS 2023




LSEG
amdax


Habib Bank AG Zurich
WINNER
PRIVATE BANKING CATEGORIES
Most Promising New Private
Bank Proposition


HOURANI
WINNER
PRIVATE CLIENT/
CONSULTANCY CATEGORIES
Estate Planning Service
WealthBriefing MENA
AWARDS 2023


ALPADIS
amdax
LSEG
COMARCH
MCB






intellectAI
WINNER
TECHNOLOGY CATEGORIES
(NON-BANKING COMPANIES)
Innovative Use of
Artificial Intelligence
WealthBriefing MENA
AWARDS 2023


Jersey Finance
Delivering Insight • Driving Innovation
WINNER
SPECIALIST WEALTH MANAGEMENT CATEGORIES
International Financial Centre (IFC)
WealthBriefing MENA AWARDS 2023


المركز
MARKAZ
WINNER
INDIVIDUAL COUNTRY OR REGIONAL CATEGORIES
Private Bank or Wealth Manager Servicing The State of Kuwait
WealthBriefing MENA AWARDS 2023


LGT
Private Banking
WINNER
PRIVATE BANKING CATEGORIES
Pure Play Private Bank
Private Bank - Philanthropy Offering




amdax
LSEG
Huddleston Jones


17 96
LOMBARD ODIER
LOMBARD ODIER DARIER HENTSCH
WINNER
PRIVATE BANKING CATEGORIES
Shariah-Compliant Wealth Management Offering
Overall International Private Bank (HQ Outside the MENA Region)


WINNER
TRUST COMPANY CATEGORIES
Foundation Creation
WealthBriefing MENA AWARDS 2023




mashreq المشرق
PRIVATE BANKING
WINNER
PRIVATE BANKING CATEGORIES
Private Bank – Client Digital Offering
Private Bank – Investment Management Platform
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WINNER
INVESTMENT CATEGORIES (MENA)
Overall Private Bank Investment Team
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We have the experts to take it beyond.

Your vision took shape the way you wanted. Your aspirations now are beyond the ordinary and you need a bank that understands you.

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Mashreq's Winning Formula Continues To Beat The Competition





Winner

- ***Overall Private Bank Investment Team***
- ***Private Bank – Client Digital Offering***
- ***Private Bank – Investment Management Platform***

Mashreq Private Banking

What key initiatives have you seen in banking industry currently?

The banking industry is constantly undergoing transformation as a result of evolving customer expectations and rapid advancements in digital innovation. While embracing this change is crucial, banks with a focus on customer journeys at the forefront of their operations are optimally leveraging technological solutions to offer clients access to a holistic suite of products and services in the most intuitive and seamless manner.

To foster better relationships, meet changing customer needs and offer a personalised experience that transcends traditional banking strategies, banks are introducing diverse models with unique solutions to help customers adapt.

Tell us about Mashreq and Private Banking, in particular?

Mashreq's experts assist clients in their decision-making process, whether it involves taking mortgages against UAE properties, equity release or providing lease rental discounts along with a range of deposit and certificate of deposit (CD) products.

Clients seeking to invest offshore can take advantage of the bank's open architecture investment platforms to access local and international equities, margin Mashreq Private Banking is committed to strategic sustainable development, client-centric solutions and a digital-first approach, trading, and structured solutions that help them access markets that are otherwise inaccessible.

What is your stance on increasing approach of banks towards use of Technology and evolution of FinTech

Banks today are embracing digital solutions to improve productivity, customer experience and design personalised products that can be accessed through multiple channels. Using its unique digital platform, Mashreq's clients can trade equities, foreign currencies and commodities that can be chosen from thousands of securities across multiple exchanges.

Clients also have access to a range of technical analysis and charting tools that can empower them to make relevant investment and trading decisions. Offering end-to-end solutions for a range of investment products, the bank has an integrated wealth management platform that allows customers to navigate all financial tasks efficiently.

In the backdrop of Dubai hosting COP 28 recently, what is the stance of Mashreq on ESG and sustainability?

Incorporating environmental, social and governance (ESG) strategies into banking operations is becoming increasingly important to manage risk, enhance reputation, meet regulatory requirements and drive innovation. In an effort to minimise waste, conserve resources and adopt eco-friendly practices, Mashreq has completely digitised its business operations and continues to devise solutions to eliminate all manual processes.

The bank's commitment to strategic sustainable development is reflected in its sustainability framework, which focuses on enabling a low carbon transition and environmental stewardship, empowering employees and communities, incorporating responsible and sustainable practices throughout the organisation, and exceeding customer expectations.


MIRABAUD
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Mirabaud: A Bi-Centennial Legacy Of Success With A Commitment To The Middle East



Samir Atitallah
CEO
Mirabaud (Middle East) Limited

Please explain why you think your firm has been able to achieve a high level of success?

Mirabaud's remarkable success can be attributed to a confluence of factors, compounding to create the Mirabaud signature experience for our clients and a high standard we are proud to uphold. With a history spanning over two centuries as a family-owned and -led business, Mirabaud brings a legacy of trust and stability to our clients. We are committed to longevity and ideally placed to support family businesses and address the intricacies of family wealth succession planning. At the same time, innovation has constructed our bicentenary heritage. We combine distinctive offerings – such as in Private Assets, a robust platform, local market awareness, personalised service and international reach. Our unwavering commitment to the region is reflected in our fully-fledged Category 1 banking license, which has proved pivotal to our ability to nurture and sustain successful client relationships in the region, and to tailor solutions to our clients' unique needs, including Sharia-compliant products. Our bank also stands out with a commendable 50% women representation, not only underscoring our dedication to diversity and inclusion but also distinguishing us in a region with a rising number of UNNW women.

Explain what benefits your firm and colleagues get from these awards.

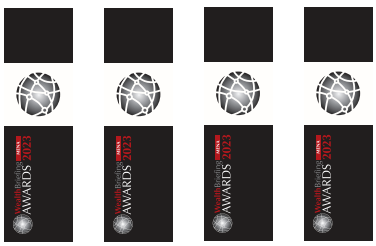
These *WealthBriefing* awards serve as a powerful testament to the dedication and expertise of our teams, effectively setting us apart as a provider of a signature experience for HNWIs actively seeking the superior and bespoke financial solutions that we offer. Furthermore, these awards have a motivating effect on all members of our team, fuelling our drive to continue delivering exceptional value that has earned us these prestigious awards.

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

Headquartered in Geneva, Switzerland, Mirabaud operates as an international banking group with a rich 200-year history. Mirabaud has a global presence with 16 offices in 10 countries across 4 continents, employing 700 individuals. Since 2007, Mirabaud has established a strong presence in the Middle East, with its office in the Dubai International Financial Centre (DIFC), where it became the first Swiss bank to obtain a Category 1 banking licence in 2010.

What are your ambitions for the business?

Our ambitions are diverse and comprehensive, but at the heart of our vision is the dedication to our personalised approach and commitment to our HNW clients. We aim to continue customising our solutions and harnessing cutting-edge technologies to meet the evolving needs of our clients, all the while staying true to our core values and legacy, ensuring finance contributes to creating a better society for all, and upholding a strong focus on regulatory compliance and risk management. Ultimately, we are resolute in our commitment to cement our position as a premier private bank and a trusted partner, renowned for service excellence, forward-thinking agility, and a responsible approach to investment. At Mirabaud, we curate bespoke wealth management solutions for each one of our clients and for generations.



Winner

- ***Private Bank Servicing Clients with Investable Assets between US$1M-US$5M***
- ***Private Bank External Asset Manager (EAM) Platform***
- ***Private Banking Service Focusing on the Requirements of UHNW Woman***
- ***Servicing Turkish Clients***

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Top Quality Client Team Provides Excellent Service

Nedbank Private Wealth (NPW) is a boutique private bank providing wealth planning and private banking services to a wide range of clients around the world. Our boutique size enables us to deliver a highly responsive and personalised approach tailored to suit each client, and this is the key to our success.

Through our offices in Dubai, London, Jersey and the Isle of Man, we pride ourselves on high standards of client service. Many of our clients have complex financial arrangements, with assets spread around the world, and we often manage clients' assets across jurisdictions, which is particularly helpful for expatriate and international clients.

We manage over £4.3 billion of client wealth across 15 currencies. We understand the opportunities that offshore finance centres, such as the Isle of Man and Jersey, offer for international clients, while still retaining the flexibility to move money onshore when needed, for example, if a client moves back to their home country.

Our comprehensive wealth management platform offers wealth planning, investment management, banking and borrowing, all managed through a single private banking relationship in conjunction with our specialist teams. Clients have the flexibility to create a bespoke account that removes the need for complex chains of different providers, reduces their administrative burden and makes it easier for them to manage their wealth.

As our private bankers progress through the business, they retain their client base, which ensures we understand our clients and their values and can take a broad view of our whole relationship with them and their families, to help manage their wealth across generations.

Working with clients, and their legal and tax advisers, we can implement wealth structures to provide inter-generational wealth succession and philanthropic planning.

Through our specialist lending team, tailored borrowing can be secured against a range of assets to help meet clients' long-term financial goals, such as cashflow and inheritance. In particular, we have extensive experience in the purchase of residential or investment properties in the UK. Clients can also borrow against their investment portfolios. Loans can be denominated in sterling, US dollars and euros, and offer flexibility in terms of structure, term and repayments.

Our foreign exchange (FX) service helps international and expatriate clients enjoy a consistent approach to managing their global finances. The ability to hold most major currencies, including AED, in their bank accounts means they can also hold assets in a local currency offshore, so they do not have to request frequent FX transactions.

We always strive to provide the highest levels of personal service and pride ourselves on developing long-term, trusted relationships with our clients. We provide a great mix of person-to-person support and travel to see our clients on a frequent basis. We also offer secure messaging, online and video services to maintain relationships, and ensure we always have the necessary knowledge to provide the best level of support.

To complement our personal approach, our online wealth services provide clients with convenient and secure access to their wealth, 24/7. Online payee management, international payments, Visa card management, and foreign exchange services make managing money quick and easy.

Retaining the *WealthBriefing 'Best Private Bank for Overall Client Service'* provides a strong, independent endorsement of our continued commitment to exemplary service. Our purpose is to protect our clients' wealth, advise them with integrity and make their lives easier. We are proud to deliver this level of quality to our clients and their families, helping them to meet their financial needs, both now and in the future.



Andrew Bates
Head of Private Banking – Middle East
Nedbank Private Wealth (NPW)

Winner

- ***Private Bank – Overall Client Service***

Family offices & the role of **third-party service providers** in the Middle East

OCORIAN

Ocorian have recently commissioned an independent survey where we interviewed family office professionals across the UAE and Saudi Arabia. All participants relied on third-party service providers, with the majority managing wealth ranging between 250 million to 1 billion dollars.

What are the trends in investment strategy?

100%
of respondents agree there is a long-term trend to alternative asset classes

90%
believe their investment risk appetite will increase over the next 12 months

87%
believe the level of philanthropy is increasing

100%
of respondents believe ESG is now a key consideration

93%
of respondents are seeing their clients move towards digital assets

How will third-party providers further develop to address the growing demands of family offices?

- Enhanced financial services
- Globalised administrative access
- Diversification of skillset
- Greater transparency through advanced technology
- Sophisticated regulatory expertise

What does the future hold for next generation family offices?

83%
of respondents are seeing a natural succession of wealth

80%
indicated the growing involvement of the next generation in shaping investment strategies

100%
of respondents agree that there is a pressing need for further action around succession planning

What are the outsourcing trends shaping third-party service providers?

9 out of 10 participants intend to increase outsourcing to third-party providers due to the following reasons:

1. The need for advanced services
2. To meet their growing risk appetite
3. To stay up-to-date with increasing regulatory demands

Contact our team

ocorian.com/private-client-services

Corporate Services | Capital Markets | Fund Services
Private Client | Regulatory, Compliance & Legal

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Global Expertise Ensures Success For Ocorian



Lynda O'Mahoney
Global Head of Business Development - Private Clients
Ocorian

Winner

- ***Succession and Estate Planning***

Please explain why you think your firm has been able to achieve a high level of success?

Ocorian's success can be attributed to a combination of factors. We have a dedicated and professional team in the GCC that excels in delivering industry leading customer service, excellent client relationship management and expertly structured solutions.

Our commitment to compliance with global substance, governance, and transparency rules, as well as ensuring privacy expectations are met, is central to our success.

We focus on creating practical solutions for our clients, with a distinct understanding of the family office and private client sector, which encompasses corporate and personal requirements. By offering integrated solutions across multiple service offerings and jurisdictions, we provide peace of mind to our clients, ensuring their wealth is protected, and their businesses are in good standing. Building trusted relationships with our clients underpinned by the expertise of our team are key drivers of our continued success.

What challenges have you had to surmount to get to this point?

A vast amount of wealth passes through family businesses in the GCC, however, the family office concept in the GCC is still developing. The region is evolving in terms of regulation and there is a need to raise the awareness of families and explain the benefits of adequate structuring and how this can be used to mitigate family businesses risks. This has led to some challenges coupled with lack of clarity and slow implementation of new laws and regulations. As an organisation that works very closely with families in the GCC, we must continually monitor the environment, both for ourselves and our clients, to ensure we remain at the forefront of industry developments and remain solution oriented.

What has led to your firm's success and what role did your colleagues play?

The success of Ocorian is the result of several factors. Staying on top of the game in terms of new laws and regulations, having the right conversations with the regulators, leveraging Ocorian's global expertise in this field and listening to the market. Working collaboratively across business lines and jurisdictions also contributes to our success.

Explain what benefits your firm and colleagues get from these awards.

These awards serve as recognition for our team's hard work and dedication. They acknowledge the late nights and effort put into driving the business forward. They reflect the investment made by Ocorian in our team and our presence in the GCC along with the great support we get from our global offices.

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

While Ocorian has a strong domestic presence with a deep understanding of local needs and nuances, we are truly international. We operate from over 20 offices located in major financial hubs worldwide, which gives us a global reach.

Our multi-jurisdictional capability allows us to offer tailored and personalised solutions that meet the unique needs of our clients, regardless of where their financial interests are held or how they are structured.

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to extraordinary people



PATRONUS
WEALTH PRIVÉ

PATRONUSWEALTH.COM

Patronus Wealth Privé (DIFC) Limited is regulated by the Dubai Financial Services Authority.

Patronus Wealth Privé: A Profile of Ambition, Success, and Global Reach



Winner

- ***Asia-Based Private Bank Active in MENA***
- ***Private Bank Servicing Clients with Investable Assets between US$5M-US$25M***

Romesh Atapattu, CEO & **Nikhilesh Pawar**, Managing Director
Patronus Wealth Privé (DIFC) Limited

Patronus Wealth Privé (DIFC) Limited, a boutique private wealth management, custody, and brokerage firm, stands as a testament to the power of experience, personalised service, and adaptability in the ever-evolving world of finance.

Founded by a team combining 45 years of private banking expertise and 30 years of commercial banking experience, Patronus Wealth has carved a unique niche in the industry. Our ambition is not just to sustain but to significantly augment our current stature in the financial world. This ambition is evident in our recent strategic move to acquire a long-standing commercial bank in Mauritius, aiming to augment our private wealth offering with specialised banking services to a niche market within the financial services industry.

Our firm's success can be attributed to a keen focus on addressing gaps in the industry, particularly around personalised service, pragmatic solutions, and rapid response to customer needs. Unlike conventional banking institutions, Patronus Wealth has thrived by offering bespoke services tailored to the unique requirements of trustees, fiduciaries, family offices, asset managers, and high-net-worth individuals. This client-centric, solution-oriented approach, coupled with our strict adherence to privacy and discretion, has set us apart in a crowded marketplace.

Success, for us, is measured not in numbers alone but in the quality of relationships and the trust we build with our clients. We have eschewed traditional advertising, relying instead on the most authentic and powerful form of marketing: word of mouth. Our clients' referrals and recommendations are the true barometers of our success. This organic growth strategy has not only helped us maintain a loyal client base but also ensures that we attract clients who align with our values and service model.

The journey to our current position has not been without challenges. In the early days of our operation, we faced significant hurdles with our proposed banking partners. This required us to pivot rapidly and persevere, demonstrating our resilience and adaptability. Our ability to navigate these challenges has been a crucial factor in our growth and stability.

Patronus Wealth operates on a global scale, extending our services from Latin America to East Asia. We engage with our clients adhering strictly to regulatory compliance and ethical standards. Good risk and reputation management ranks high in our ethos. Our current international footprint underscores our capability to understand and cater to diverse financial landscapes and client needs, further reinforcing our position as a global player in private wealth management.

In conclusion, Patronus Wealth Privé's journey is one of ambition, resilience, and unwavering commitment to excellence. Our success is a reflection of our ability to adapt to industry changes, our dedication to personalised service, and our global reach. As we move forward, our focus remains on expanding our offerings, deepening client relationships, and continuing to provide unparalleled service in the private wealth management sector.

WealthBriefing MENA Award Winners 2023

Family Office Advisory



Achieving excellence in a family office requires a trifecta of success. Assembling the right team, implementing meticulous operational processes, and leveraging cutting-edge technology to support and enhance operations.

At **PwC Middle East** our award winning team can help your family office evolution by supporting your journey through wealth and restructuring, ownership strategy and family office advisory.

> **Off the back of three wins last year in relation to Family Office, the team and I are delighted to be awarded again this year, solidifying our strength and leadership position in the field of Family Office advisory across the GCC.**
>
> **- Ismael Hajjar**,
> PwC ME Partner - International Private Wealth & Family Offices & International Tax

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PwC's Expertise Continues To Elevate Their Profile In The MENA Region

Winner

- ***Family Office Governance Service Provision***

PwC



What has led to your firm's success and what role did your colleagues play?

This year was truly special for us. First, the transformation of our industry along with the tax laws being enacted across the Middle East, with still more to come. Second, the launch of a number of government initiatives that focused on family businesses and family offices. Third, many families starting their journey to transition from business operators to investors, as well as crafting plans to succeed in growing their wealth and planning succession.

Our firm's strong focus on and our relentless commitment to understanding and addressing the unique needs of family-owned businesses in the MENA region has allowed us to develop deep expertise and a comprehensive understanding of their unique needs and challenges. This specialisation has enabled us to provide tailored and innovative solutions that truly add value to our clients.

Explain what benefits your firm and colleagues get from these awards.

Winning awards such as the *WealthBriefing* Awards in MENA brings numerous benefits to both our firm and the team. These awards serve as a validation of our firm's expertise and the quality of our services. They act as a testament to the hard work and dedication of our team members, boosting their morale and motivation. The recognition also helps enhance our reputation in the industry, attracting potential clients and business opportunities.

The *WealthBriefing* Awards provide a platform for the PwC team and offer them an opportunity to share insights and best practices with a wider audience through interviews and publications. This exposure helps position our firm as a trusted advisor and industry leader, further strengthening our brand and credibility. Internally, it fosters a sense of pride amongst our colleagues.

How and in what ways do you measure success?

The PwC IPW & FO team believes that success is measured by the value we create for our clients and the impact we have on their businesses and personal wealth. We take a client-centric approach, focusing on understanding their unique goals and challenges. By delivering tailored solutions that address their specific needs, we aim to help them achieve their desired outcomes. In addition to client satisfaction, we also measure success through the growth and development of our team members. We invest in their professional development and provide them with opportunities to enhance their skills and expertise.

We continuously monitor the market landscape, regulatory changes, and emerging technologies to ensure that we are providing our clients with the most relevant and innovative solutions. By staying at the forefront of our field, we can adapt and evolve to meet the evolving needs of our clients.

What are your ambitions for the business?

Our ambitions for the business are centred around three key areas. Firstly, we aim to further strengthen our position as the leading advisor to family-owned businesses in the MENA region. Secondly, we are committed to driving innovation and embracing emerging technologies. We recognise the transformative potential of technologies, such as artificial intelligence, data analytics, and automation. By harnessing these tools, we aim to enhance the efficiency and effectiveness of our services, enabling us to deliver even greater value to our clients. Lastly, we have a strong focus on sustainability and corporate social responsibility. We are dedicated to making a positive impact on society and the environment.

It’s time to leave your investments in the hands of a bank you trust

Wherever you may be in the world, protecting your wealth and assets is our priority, which is why we place them in the safe hands of a team of financial experts in our Asset and Wealth Management department



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QNB Group

QNB named *'Best Wealth Manager Servicing in Qatar'* 2023 by *WealthBriefing*.

Doha, 19 November 2023 – QNB Group, the largest financial institution in the Middle East and Africa, has been selected as *'Best Wealth Manager Servicing in Qatar'* at the tenth annual *WealthBriefing* MENA Awards 2023.

The prestigious award is a testament to the bank standing as the leading wealth management institution in Qatar and marks its dedication to creating sustainable investment solutions and customised advisory services to empower its affluent customers to strategically manage their wealth and secure their financial future.

It also recognises QNB's efforts to develop a leading platform of investment instruments covering equity, fixed income, structured products, real estate and commodity investments to help clients build and grow their wealth, according to their return objectives and risk profile.

"We are thrilled with this new recognition that celebrates our position at the top of the private banking sector and underlines our investment expertise to achieve the highest return for our clients."

Commenting on the achievement, Mr. Adel Khashabi, Senior Executive Vice President – QNB Group Asset and Wealth Management, said: "We are thrilled with this new recognition that celebrates our position at the top of the private banking sector and underlines our investment expertise to achieve the highest return for our clients.

We see this award as a tribute to our strong record in successfully serving our clients with the state-of-the-art solutions and products and cater to their investment needs. We look forward to offering our clients customised investment opportunities while fostering excellence and innovation."

The WealthBriefing MENA Awards recognise outstanding organisations, which have demonstrated innovation and excellence.

The *WealthBriefing* MENA Awards recognise outstanding organisations, which have demonstrated innovation and excellence. Each of these awards is highly contested and is subject to a rigorous process of selection.

Through its subsidiaries and associate companies, QNB Group extends to more than 28 countries across three continents providing a comprehensive range of advanced products and services. The total number of employees is more than 30,000 operating through 900 locations, with an ATM network of more than 4,800 machines.

WealthBriefing MENA AWARDS 2023

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Gail Goring
Partner & Head of Regulatory & Compliance Services
Re/think



Winner

- ***Compliance/ Regtech Solution***

Please explain why you think your firm has been able to achieve a high level of success?

Re/think has been helping clients successfully set up and thrive in the Middle East for a decade. Our award-winning business advisory and outsourced services firm provides a broad, sophisticated suite of services (including regulatory and compliance, accounting, tax advisory, HR consultancy and audit services) to regulated firms, multi- and single-family offices, and other operating businesses across the UAE.

Our clients value our ability to carefully guide them through the constantly-evolving regulatory framework of the UAE, offering them turnkey solutions every step of their journey, throughout their business lifecycle.

Our clients know that they are in safe hands. Re/think's extensive, longstanding experience in the region and the close working relationships we have developed with regulators and leading industry partners over the years enables us to anticipate our clients' needs and exceed their expectations.

Clients appreciate the diversity of our senior directors, who have over 50 years' combined experience in the UAE and who have previously worked in all leading global financial centres. We not only understand where the client is coming from, but also leverage our insights from and connections in those markets for our clients' benefit.

Finally, innovation is in our DNA and has been a pillar for our success. We utilise technology to develop advanced solutions and unlock greater value for our clients, while maintaining the highest standards of regulatory compliance.

What challenges have you had to surmount to get to this point?

One notable challenge has been staying abreast of the ever-evolving regulatory landscape. The financial and business environment is dynamic, and our commitment to providing top-notch compliance and regulatory solutions requires constant vigilance and proactive adaptation to changes.

Another challenge has been keeping pace with the rapid evolution of AI in recent year years. Our continued investment is critical, with technology being key to both our service delivery and our clients' operations.

Finally, the competitive landscape is fierce as the UAE's presence in the global economy increases. Nevertheless, Re/think has prevailed as a trusted leader in compliance and regulatory solutions.

Explain what benefits your firm and colleagues get from these awards.

Winning this award for the third time a source of great pride for our firm, colleagues, clients and peers. It is a testament to our team's hard work and dedication to clients and the innovative solutions we bring to the table.

This recognition is another independent mark of excellence that reinforces our reputation in this market and the trust that our clients place in Re/think.

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

Whilst Re/think was established in the UAE in 2013, the vast majority of our clients are international and diverse – predominantly financial services companies or single- and multi-family offices already based in other global jurisdictions and seeking to expand their operations in the UAE and throughout the Middle East.

Our team comprises local and international professionals who mirror our clients in diversity, and who thus understand how best to serve them.



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A Team With A Sense Of Belonging And Solidarity

Nicolas Farah
CEO
REYL Finance (MEA) Ltd



Winner

- ***Overall Fund Manager - Regional and/or Global Reach***

Please explain why you think your firm has been able to achieve a high level of success?

There are three main aspects of our business that make us successful. The first is client focus: our clients here in the MENA region tend to be mainly international entrepreneurs and institutional investors, that have great expectations of us. Not only do they want us to grow their asset base but they're also looking for support with their day-to-day businesses, as well as with such matters as succession planning.

"The opportunity to develop a brand and a reputation where the quality of our service, the determination of our teams, our year-on-year positive results and our continued growth speak for themselves."

The *WealthBriefing* MENA accolade that we received is for our Fund Management service but this is only one element of our business offering, as we include Fund Management into a broader and more complete set of client solutions that include our *Entrepreneur & Family Office Services, Corporate Finance, Asset Services and Asset Management*. We really put the client at the heart of these offerings.

Secondly, our management structure is such that important decisions can be taken relatively swiftly, thereby never missing opportunities to do the right thing for the client.

Finally, we have a young and committed team that we look after particularly well and treat as part of the REYL family. I have almost no headcount turnover and we are very proud of that sense of belonging and solidarity that exists within our teams.

What challenges have you had to surmount to get to this point?

Launching Reyl Finance (MEA) Ltd. in Dubai in 2015 was challenging in that we were relative newcomers to the region, our brand was not widely recognised and we had to compete for business against large and established institutions. We viewed this as both a challenge and a blessing as it allowed us to start with a clean sheet, giving us the opportunity to develop a brand and a reputation where the quality of our service, the determination of our teams, our year-on-year positive results and our continued growth speak for themselves.

From whom and what do you get inspiration? Where do you get your ideas?

I have an excellent team, a great Management Committee, and a fantastic and supportive Board of Directors: I listen to them all. What I love about doing business in Dubai and the DIFC in particular is the great diversity that it brings.

At Reyl Finance (MEA) Ltd. we have 12 nationalities, as many languages and a breadth of backgrounds and experiences – this makes for great teamwork and the generating of excellent new ideas, all of which leads to great inspiration. This diversity of thought and experience is vital when you have a diverse client base that wants you to challenge the status quo.

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SFM Corporate Services - Experts In Company Formation & Administration

Please explain why you think your firm has been able to achieve a high level of success.

Since 2006, SFM Corporate Services has consistently stood as a world leading provider of premium business solutions. Our commitment to excellence has been crucial in the establishment of companies and the diversification of business ventures of corporate managers, investors, and entrepreneurs.

Our strategically positioned offices in the United Arab Emirates, Switzerland, Seychelles, and Hong Kong serve as pivotal centers for the delivery of a diverse range of corporate services and corporate finance activities across more than 45 international jurisdictions. Our objective is to provide services that bring additional value to our clients which starts at company formation and extends to company administration, accounting services, business planning where we provide indispensable support to our clients throughout their structuring and development phases. We also assist our clients with bank account opening, tax registration and filing across jurisdictions, and are constantly broadening our services to meet their evolving needs. We strive to be attentive to our clients' needs by offering ad hoc services, assembling teams of experts who are ready to listen and respond in over a dozen languages.

Our operating model is aligned to the diversity of our clients who are globally based and operating internationally.

Our commitment is reflected in our extensive industry experience, strategic global presence, proactive adaptation, and comprehensive suite of services. We believe our ability to consistently adapt and evolve to meet the changing needs of our clients has been a cornerstone of our success.

What challenges have you had to surmount to get to this point?

The main challenge is always to ensure services are aligned with market demands in a continuously evolving environment. Overcoming this challenge requires a balance between anticipation, agility, innovation, and commitment towards excellence to ensure client satisfaction.

Explain what benefits your firm and colleagues get from these awards.

We are proud to have been selected as the winner in the Corporate Services category at the *WealthBriefing* MENA Awards 2023. This award is a validation and confirmation from the Wealth Management industry of the enabler role of SFM Corporate Services.

All our employees and partners play a vital role in our success. Their expertise, dedication, and collaborative effort contribute significantly to the delivery of high-quality services and solutions, fostering innovation, and maintaining client satisfaction.

From whom and what do you get inspiration? Where do you get your ideas?

Inspiration and ideas come from various sources. We consider industry trends, clients feedback, and global economic shifts. Our growth is solid and stable, we are expanding into new markets, developing our services, and always enhancing our customer experience.

What are your ambitions for the business?

Our strategy is to solidify SFM Corporate Services as a global leader in the Corporate Services industry, always driving customer satisfaction. We have always been initiating industry innovations, with digital initiatives leveraging on technologies or with expansion of services provided. We aim to keep this role in the market.



Christelle Rouanet
Managing Partner
SFM Corporate Services

Winner

- ***Corporate Services***



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Leading Technology Services In The MENA Region



Daniel Eriksson
Vice President and Global Head of Product Management and Solutions Consulting
SS&C Advent

Winner

- ***Front Office Solution***

What challenges have you had to surmount to get to this point?

Our industry is evolving. Client needs, technology and services are constantly evolving, and it is vital we continue to innovate in order to stay at the leading edge and remain a force in this industry.

With such diversity in local regulatory requirements, market practices, instrument types and client expectations, a key challenge is to ensure our products and services have the flexibility and specialisation to cope with all these different and evolving market demands.

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

Explain what benefits your firm and colleagues get from these awards.

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

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

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

How and in what ways do you measure success?

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

From whom and what do you get inspiration? Where do you get your ideas?

We strive to be seen as active members of all of our client communities. Feedback from clients, prospects and market influencers are all key elements of our innovation.

SS&C also has a diverse and multi-skilled team, distributed across our geographical reach. Collaboration is key to our success. We use technology and culture to optimise collaboration and empower teams to drive the business forward.

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

"Our customers rely on us to keep them at the leading edge of technology and services so they can provide better services to their clients".

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

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ImpaQt Wealth

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Empowering Financial Frontrunners With Scalable Solutions



Mohamed Louizi
COO
swissQuant

Winner

- ***Innovative Wealth Management Client Solution***

Established in 2005, swissQuant is a technology firm specialising in the development and implementation of software solutions and data analytics tools for the financial industry. Our core business is to support market leaders in their geographic growth and digital transition. Headquartered in Zurich, swissQuant partners with premier financial institutions worldwide, providing a competitive digital edge through sophisticated wealth and risk management technologies, coupled with unparalleled client service.

Please explain why you think your firm has been able to achieve a high level of success?

Our firm is strategically positioned at the intersection of traditional financial insight and modern innovation, which is where our augmented financial solutions take shape. For over 18 years, we've focused on enhancing the capabilities of financial professionals by providing them with advanced solutions that augment their expertise, enabling them to leverage our technology to enrich the personal and bespoke service they are known for. Our commitment lies in building tools that not only address today's financial demands but are also crafted with the foresight to adapt to tomorrow's challenges. As we move forward, we're integrating our extensive experience with a proactive approach that includes advancements in AI, comprehensive analytics, and user-friendly interface designs, all while ensuring that our solutions are in step with the growing importance of ESG considerations.

How and in what ways do you measure success?

First and foremost, client satisfaction and retention are key indicators of our success. We also track AuM growth and the performance of our wealth advisory software in delivering value to our clients. In addition, industry recognition and awards, such as the one we've received for Innovative Wealth Management Client Solution, validate our achievements. Finally, our ability to attract and retain top talent is a measure of our success in creating a workplace where innovation and excellence thrive.

From whom and what do you get inspiration? Where do you get your ideas?

Our inspiration primarily stems from our clients. Their insights and needs are pivotal in shaping our approach to innovation within the space. This ongoing client interaction fosters a breeding ground for creative solutions to contemporary wealth management challenges. Our team, comprising individuals with varied backgrounds and expertise, is another crucial source of inventive ideas. Their collective wisdom enriches our perspective and approach. Additionally, our connection to the academic world, notably through our Scientific Advisory Board, keeps us abreast of the latest scientific developments. This link ensures we're not only responsive to new trends but are actively incorporating cutting-edge research into our strategies.

If there is one thing you would like to change about the wealth management industry, what would it be?

While the wealth management industry offers valuable services, it can sometimes be perceived as exclusive or complex. We envision a future where wealth management is more transparent and accessible. Wealth management should revolve around clients' individual goals and aspirations. Technology plays an integral role in this, providing tools that empower clients to make informed decisions and collaborate more closely with their advisors. This transformation will create a more comprehensive and user-friendly wealth management experience for both advisors and clients.

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Navigating The Wealth Management Landscape: Insights From An Industry Leader

Please explain why you think your firm has been able to achieve a high level of success?

I believe that our firm's success in wealth management stems from a blend of expertise, client-centric strategies, and a commitment to personalised financial solutions. We've excelled by having a team that possesses deep industry knowledge and a diverse skill set, allowing us to navigate complex financial landscapes effectively. Our success is deeply rooted in our unwavering dedication to understanding our clients' unique financial aspirations and tailoring bespoke solutions to meet their needs. We prioritise building long-term relationships based on trust, transparency, and a thorough understanding of our clients' goals. Moreover, our firm's culture fosters continuous learning and collaboration among our team members, which ensures that we consistently deliver exceptional service and stay at the forefront of industry trends.

How and in what ways do you measure success?

Success in the wealth management industry spans beyond mere financial metrics, encompassing both qualitative and quantitative factors. We prioritise various key aspects to measure our success. Client satisfaction, retention rates and meeting financial goals; underscores our commitment to building lasting relationships. Investment performance, aligned with benchmarks and client objectives; showcases our ability to provide consistent, risk-adjusted returns. Upholding ethical standards and regulatory compliance remains paramount; reflecting our dedication to ethical conduct. Our team's growth, satisfaction, and development contribute significantly to our success, alongside our adaptability to market changes through innovation and technology adoption. By incorporating these metrics, we ensure a holistic evaluation, emphasising not only financial achievements but also service excellence, ethical conduct, and community impact in wealth management.

What are your ambitions for the business?

Our ambitions for the business revolve around a multifaceted objective geared towards sustained growth, innovation, and exceptional client service. Firstly, we aim to further expand our reach by deepening our relationships with existing clients and extending our services to new markets. This expansion aligns with our goal to offer our tailored wealth management expertise to a broader client base. Secondly, we are committed to continuously enhancing our technological capabilities. Embracing cutting-edge advancements in financial technology will enable us to deliver even more personalised, efficient, and secure solutions to our clients. Moreover, we aspire to be at the forefront of industry trends and developments. This involves staying agile in response to market shifts, regulatory changes, and emerging investment opportunities. Our ambition is not only to adapt but also to lead in setting new standards for excellence in wealth management practices.

If there is one thing you would like to change about the wealth management industry, what would it be?

A critical change that we believe in and are sincere in implementing is fostering more transparency across the industry. Greater transparency in fee structures, investment products, and overall practices would enhance trust and confidence among clients. It's essential to ensure that clients fully understand the implications and risks associated with their investments. Additionally, I believe in advocating for more personalised and tailored solutions for clients. While there have been advancements in this regard, there's always room for improvement in providing more individualised financial strategies that truly align with clients' unique goals and circumstances.



Suhail Moosa
Executive Director
Taurus Wealth Advisors

Winner

- ***Leading Individual***



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Mohamed Hamed Abdellatif
CEO
UBP Middle East

Winner

- ***Best Boutique Private Bank***

Please explain why you think your firm has been able to achieve a high level of success?

UBP stands out distinctly in the MENA region due to three key factors:

1. Family-Owned Structure and Agility:

One of our primary strengths lies in being a family-owned bank. This unique ownership model ensures a flat organisational structure, where decisions concerning clients are made with direct involvement from the family. This streamlined approach allows us to operate with exceptional agility, making swift and efficient decisions. Our straightforward processes enable us to respond promptly and effectively.

2. Rapid Operational Response:

At UBP, we pride ourselves on our rapid response times. Whether it's opening accounts or addressing everyday client inquiries, our operational efficiency is especially valued by our clients, providing reassurance, particularly during periods of market uncertainty.

3. Local Expertise and Access to Global Resources:

Operating as a private bank with deep local insights, we are well-equipped to support advisory services and active client mandates. Our local knowledge is complemented by the ability to tap into the expertise of specialists across UBP, including private markets. This wealth of knowledge empowers us to deliver on our commitment to provide robust service and innovative investment ideas. Furthermore, our strong Discretionary Portfolio Management (DPM) team based in Geneva enhances our comprehensive offerings.

In addition to these factors, UBP's approach is bolstered by the bank's robustness. Our Tier 1 Ratio, standing at an impressive 27.3% as of 30.06.2023, is among the highest in the sector. This solid foundation underscores our commitment to delivering exceptional service and innovative financial solutions to our valued clients.

Explain what benefits your firm and colleagues get from these awards.

This award shows that UBP is committed to cater to client needs in the MENA region. We want to build on this record of success with a promise of more to come.

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

Union Bancaire Privée, headquartered in Geneva, is a private bank of global span that has been active in the Middle East for more than 20 years. Initially operating only out of Switzerland, the region is now a core part of UBP's business, especially as we have built on the success of our private banking services run from Dubai since 2012.

What are your ambitions for the business?

UBP's oversees assets exceeding USD 10 billion in the Middle East, managed across our offices in Geneva and Dubai. Our longstanding dedication to the region is evident from our early days, having recruited a diverse team of around 40 experts in Dubai, specialising in various Middle Eastern markets. We're committed to nurturing talent, with plans to expand our workforce, ensuring our teams have every opportunity to build successful careers. Looking ahead, our strategic growth plan spans the next few years and beyond. Our deep commitment is exemplified by our recent office expansion in Dubai, a testament to our unwavering focus on the region's thriving potential.

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*Studies undertaken by Wealth Dynamix show firms can benefit from an 80% reduction in the man hours spent on complex processes, from onboarding and reviews, to complaints handling and amendments of client legal structures.

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Wealth Dynamix's Path To Success By Revolutionising Wealth Management



Steve D'Souza
Director of Direct Sales
Wealth Dynamix

Please explain why you think your firm has been able to achieve a high level of success.

In today's ever-evolving business landscape, the key to success has shifted from merely digitising internal processes to delivering hyper-personalised services at scale. This transformation is essential to meet the dynamic expectations of today's clients while maintaining profitability. At our core, we recognise that the role of relationship managers (RMs) as trusted advisors remains paramount in private banks and wealth management firms.

Our success stems from our ability to support these new operating models by empowering RMs to foster meaningful client relationships. We have excelled in implementing a hybrid servicing model that relieves RMs of administrative burdens while providing clients with proactive, informed experiences.

Firms adopting hybrid models not only meet client demands for digital empowerment but also gain efficiency in both operational and front-line processes. These models have greater potential for scalability, with staff numbers that are less sensitive to an increase in client numbers and AuM. To cater to the diverse needs of Wealth Management & Private Banks (WM&PB), ranging from boutique firms to large global organisations, we have developed two Client Lifecycle Management (CLM) offerings. These offerings provide flexibility in managing deployments, security, and the 'build' vs. 'buy' approach, ensuring we serve a wide spectrum of clients.

What has led to your firm's success and what role did your colleagues play

We believe that there are several key factors that make Wealth Dynamix the top choice for firms wanting to achieve process efficiencies, enrich client service and ensure compliance.

First and foremost, we believe that no other company can match our deep domain expertise and focus on client lifecycle management and wealth management - a combination that allows us to meet the continually evolving requirements of our firms and their clients globally. We understand the regional nuances of wealth management, tailoring our solutions to meet the specific challenges faced by our clients and enabling them to be truly client centric.

Secondly, we support wealth management firms and private banks throughout the entire client lifecycle, from initial prospecting and engagement, through to onboarding, ongoing client management and servicing and the transition of wealth to the next generation. Our modular CLM solutions can be deployed at any stage, helping firms drive efficiency, ensure scalability, and provide highly personalised client experiences.

What challenges have you had to surmount to get to this point?

Wealth Management is fundamentally an industry centred on clients, and the industry continues to put these at the heart of how it operates. However, we still see firms where the barriers to change mean they have succumbed to inertia, and the drive to push the adoption of digital technologies and hybrid servicing has slowed. For example, according to a study from Compeer, fewer than 10% of financial advisors can manage and service a client request via mobile or tablet device, while 42% of opportunities are 'left on the table' due to a lack of client contact.

Our experienced team drawn from the WM&PB Industry (Including former bankers) has allowed us to deeply understand the perspective of staff and help overcome the barriers to change many organisations face. We achieve this by dispelling the 'myths' such as the potential for technology to damage client relationships, self-service as an impact to a firm's compliance or that CRM is just a 'big brother' tool.

What are your ambitions for the business?

Our ambitions for the business are driven by a desire to expand our reach and support wealth management firms globally. We aim to have clients in every continent, providing our services to private banks, discretionary wealth managers, and multi-family offices.

Winner

- ***CRM Solution***

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Servicing Turkish Clients
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Private Bank Servicing Clients with Investable Assets between US$1M-US$5M
Private Bank External Asset Manager (EAM) Platform
Private Banking Service Focusing on Requirements of UHNW Women
MENA
2023




NEDBANK
PRIVATE WEALTH
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PRIVATE BANKING CATEGORIES
Private Bank – Overall Client Service
MENA
2023


OCORIAN
WINNER
TRUST COMPANY CATEGORIES
Succession and Estate Planning
MENA
2023






PATRONUS
WEALTH
WINNER
PRIVATE BANKING CATEGORIES
Private Bank Servicing Clients with Investable Assets between US$5M-US$25M
Asia-Based Private Bank Active in MENA
MENA
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WINNER
PRIVATE CLIENT/ CONSULTANCY CATEGORIES
Family Office Governance Service Provision
MENA
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Amritaanshu Agrawal

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INDIVIDUAL COUNTRY OR REGIONAL CATEGORIES
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TECHNOLOGY CATEGORIES (NON-BANKING COMPANIES)
Compliance/RegTech Solution
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INVESTMENT MANAGEMENT CATEGORIES
Overall Fund Manager - Regional and/or Global Reach
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SPECIALIST WEALTH MANAGEMENT CATEGORIES
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TECHNOLOGY CATEGORIES (NON-BANKING COMPANIES)

CRM Solution — WINNER

WEALTH DYNAMIX

Front Office Solution — WINNER

SS&C | ADVENT®

Transaction Processing Solution — WINNER

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What borders?

Compliance/ Regtech Solution — WINNER

re/think

Innovative Wealth Management Client Solution — WINNER

swissQuant
Mastering Complexity

Client Reporting Solution — WINNER

FundCount

Most Innovative Overall Fintech Solution — WINNER

COMARCH

Client Reporting Solution — WINNER

COMARCH

Innovative Use of Artificial Intelligence — WINNER

intellectAI

SPECIALIST WEALTH MANAGEMENT CATEGORIES

Most Innovative Wealth Management Model — WINNER

standard chartered

Corporate Services — WINNER

SFM

International Financial Centre (IFC) — WINNER

Jersey Finance
Delivering Insight ▪ Driving Innovation


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EAM CATEGORIES

WINNER

Family Office Proposition by an EAM in the MENA Region

PICARD ANGST

WINNER

Investment Process

FormInvest

WINNER

AuM up to US$ 1 Billion

gsb

WINNER

Leading Female Executive

ALISON WHATNALL

gsb

WINNER

CEO

RENOY KUNDUKULAM

FINMARK CAPITAL LTD

WINNER

Overall External Asset Manager

CdR CAPITAL

PRIVATE CLIENT/CONSULTANCY CATEGORIES

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Legal Advice Provision for UHNW Individuals, Families or Wealth Managers

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AL TAMIMI & CO.

WINNER

Accounting Provision for Servicing Private Clients

GTAG
Gulf Tax Accounting Group

WINNER

Management Consultancy

EY Building a better working world

WINNER

Estate Planning Service

HOURANI

WINNER

Family Office Advisory Offering

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Family Office Governance Service Provision

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TRUST COMPANY CATEGORIES

Institutional Trust and Fiduciary Company
WINNER

TMF GROUP

Independent Trust or Fiduciary Company
WINNER

CRESTBRIDGE
FAMILY OFFICE SERVICES

Trust and Fiduciary Company (HQ Outside the MENA Region)
WINNER

VISTRA

Family Office Service Provision
WINNER

ACCURO
Trust and Private Office

Succession and Estate Planning
WINNER

OCORIAN

Foundation Creation
WINNER

FAMILY OFFICE CATEGORIES (MENA)

Wealth Manager Servicing Family Offices
WINNER

BNY MELLON
WEALTH MANAGEMENT

Next Generation (Next-Gen) Programme or Service
WINNER

EY Building a better working world

INVESTMENT MANAGEMENT CATEGORIES

Real Estate Investment Proposition or Service
WINNER

BNP PARIBAS
WEALTH MANAGEMENT

Structured Product Provider
WINNER

PICARD ANGST

Private Market Offering
WINNER

PICARD ANGST

Alternatives Offering
WINNER

THE DXB WATCH FUND

Digital Assets Offering
WINNER

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Overall Fund Manager - Regional and/or Global Reach
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Best Boutique Private Bank — WINNER

UBP
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Pure Play Private Bank — WINNER

LGT Private Banking

Private Bank – Philanthropy Offering — WINNER

LGT Private Banking

Private Bank Servicing the Expat Community — WINNER

Emirates NBD

Private Bank Servicing Clients with Investable Assets between US$1M-US$5M — WINNER

MIRABAUD

Private Bank External Asset Manager (EAM) Platform — WINNER

MIRABAUD

Private Banking Service Focusing on the Requirements of UHNW Woman — WINNER

MIRABAUD

Private Bank Servicing Clients with Investable Assets between US$5M-US$25M — WINNER

PATRONUS WEALTH

Asia-Based Private Bank Active in MENA — WINNER

PATRONUS WEALTH

Private Bank Servicing Clients with Investable Assets over US$25M — WINNER

INDOSUEZ WEALTH MANAGEMENT

Private Bank – Credit Provider — WINNER

INDOSUEZ WEALTH MANAGEMENT

Private Bank Servicing NRI/NRP Clients — WINNER

Deutsche Bank

Most Promising New Private Bank Proposition — WINNER

Habib Bank AG Zurich
(Incorporated in Switzerland 1967)

Private Bank – Client Digital Offering — WINNER

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Private Bank – Investment Management Platform — WINNER

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smartKYC is built to provide a 360° view of your client. Intelligent automation providing a platform for private banks and wealth managers to empower their front-of-house teams to be an efficient and effective first-line of KYC defense and focus their compliance teams where it really matters.

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PRIVATE BANKING CATEGORIES (CONTINUED)

Private Bank – Overall Client Service

WINNER

NEDBANK PRIVATE WEALTH

Private Bank – Discretionary Portfolio Management (DPM) Offering

WINNER

FAB PRIVATE BANKING

Private Bank Wealth Planning Team

WINNER

HSBC Global Private Banking

Shariah-Compliant Wealth Management Offering

WINNER

17 96 LOMBARD ODIER

LOMBARD ODIER DARIER HENTSCH

Overall International Private Bank (HQ Outside the MENA Region)

WINNER

17 96 LOMBARD ODIER

LOMBARD ODIER DARIER HENTSCH

Private Bank - Private Equity Offering

WINNER

BNP PARIBAS WEALTH MANAGEMENT

Private Bank – ESG Offering

WINNER

BNP PARIBAS WEALTH MANAGEMENT

Private Bank - MENA Region

WINNER

BNP PARIBAS WEALTH MANAGEMENT

INVESTMENT CATEGORIES (MENA)

Multi-Family Office (MFO)

WINNER

BearBull Global Investments Group Limited

Overall Private Bank Investment Team

WINNER

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TECHNOLOGY CATEGORIES
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CRM Solution
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INDIVIDUAL COUNTRY OR REGIONAL CATEGORIES

WINNER

Servicing Turkish Clients

MIRABAUD

WINNER

Private Bank or Wealth Manager Servicing The State of Kuwait

المركز MARKAZ

WINNER

Wealth Manager Servicing Qatar

QNB

WINNER

Private Bank or Wealth Manager Servicing The Kingdom of Saudi Arabia

بنك أبوظبي الأول FAB First Abu Dhabi Bank PRIVATE BANKING

WINNER

Private Bank or Wealth Manager Servicing United Arab Emirates

بنك أبوظبي الأول FAB First Abu Dhabi Bank PRIVATE BANKING

LEADERSHIP AND INDIVIDUAL CATEGORIES

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Wealth Management Rising Star Under 40

GAURAV SHARMA

standard chartered

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RASHA BADAWI

BARCLAYS | Private Bank

WINNER

Leading Woman in Wealth Management

RASHA BADAWI

BARCLAYS | Private Bank

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Leading Individual

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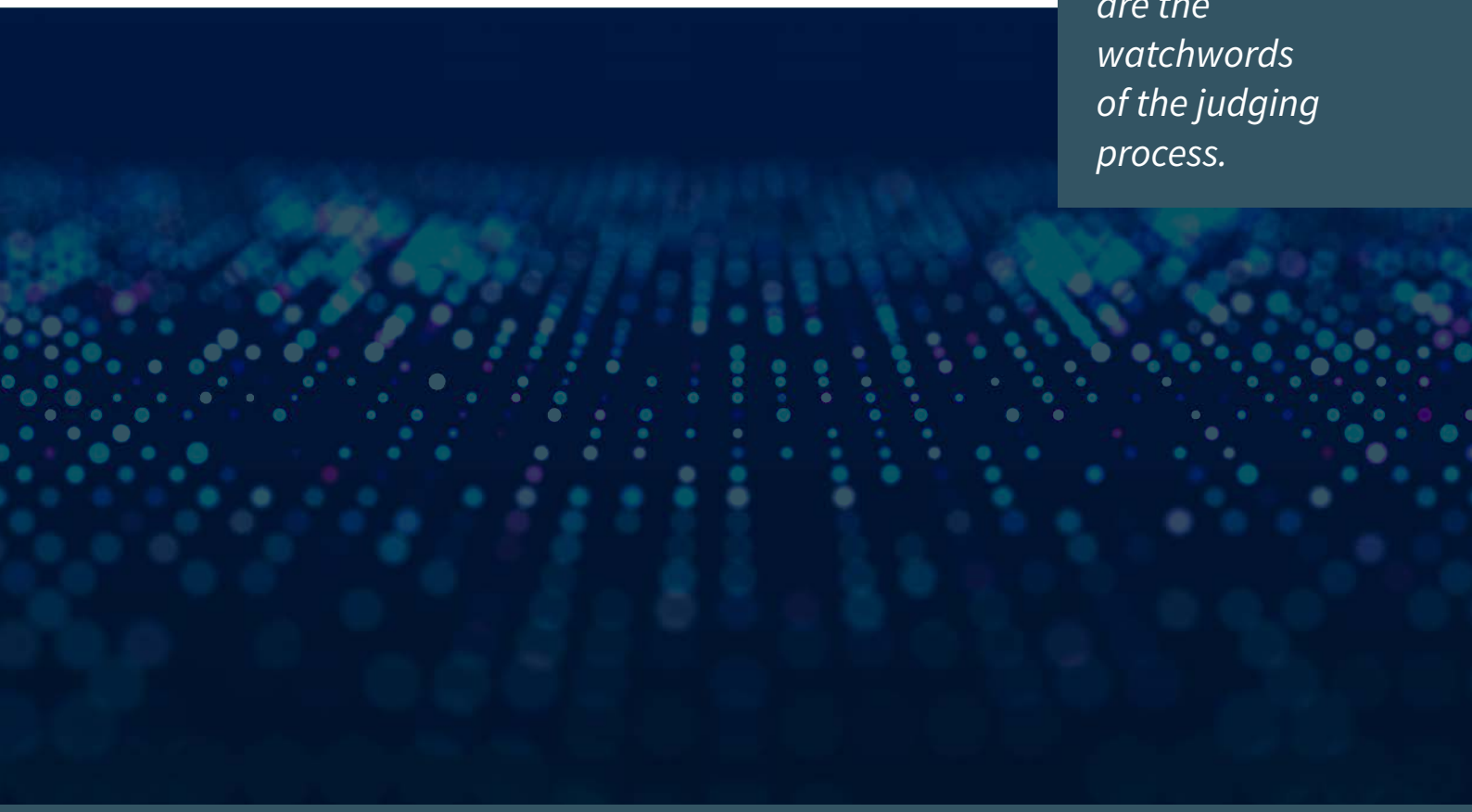
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Miami *Family Wealth Report* Awards
incorporating Latin America & the Caribbean

8 & 22 FEBRUARY 2024
WealthBriefing Swiss Awards
WealthBriefing WealthTech Americas Awards

6 & 21 MARCH 2024
WealthBriefing Swiss EAM Awards
WealthBriefing European Awards

2 & 30 MAY 2024
Family Wealth Report Awards
WealthBriefingAsia & Greater China Awards

27 JUNE 2024
WealthBriefing Wealth *For* Good Awards

3 OCTOBER 2024
WealthBriefingAsia EAM Awards

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