PROFESSIONAL WEALTH MANAGEMENT

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Judges - Global Private Banking Awards 2013

BY EMMANUEL ADEYEMI

The judges at the Global Private Banking Awards 2013

Yuri Bender,
Editor-in-Chief, Professional Wealth Management

based in London, UK

Yuri Bender is a financial journalist specialising in international asset management, private banking and capital markets. He joined the Financial Times group in 1992 and launched FT Mandate, a newspaper for the institutional investment industry, in 1999. He has since moved to concentrate more on private banking, launching the pan-European magazine and website, Professional Wealth Management, in 2001 followed by a separate Asian edition, PWM Asia, in 2008, and is editor-in-chief of both titles. He is particularly interested in comparing business and distribution models of private banking and asset management groups. He chairs industry panels on these topics and writes regularly on them for the FT newspaper. Yuri studied Investment Management at the London Business School.

Seb Dovey,

Partner, Scorpio Partnership,
based in London, UK

Sebastian focuses on the execution and development of strategy recommendations for Scorpio Partnership. He has completed assignments around the globe for private banks, global banks, asset managers, family offices, technology firms, service providers, aggregators and start-up wealth management initiatives. He is also currently involved in creating and building education-based solutions for a number of clients.

He is a lecturer at The Swiss Finance Institute (formerly the Swiss Banking School) for its executive MBA programme, speaking on family offices and wealth management. He is also a regular commentator on the wealth management industry in the press and at conferences and academies.

Sebastian's industry views have been broadcast on Bloomberg TV and CNBC and published in several leading industry journals, and publications.

Sebastian has been an advisory board member of the Wealth Congress since 2003. He is also the creator and faculty director of the International Wealth Management Academy developed with the Financial Times Group.

Before establishing Scorpio Partnership, Sebastian was the London-based managing editor of Global Private Banking, an Institutional Investor trade publication covering international wealth management. He joined in 1995 in Hong Kong to assist with the launch of Global Private Banking in Asia, having previously been with Euromoney.

Sebastian holds a first class BA (Hons.) degree in Modern History from University College London and was awarded an MSc (Econ.) with distinction from the London School of Economics.

Shelby du Pasquier,

head of Banking and Finance Group, Lenz & Staehelin,

based in Geneva, Switzerland

Shelby R. du Pasquier is considered as a leading lawyer in banking and financial services in Switzerland. He is the co-head of the Banking and Finance group of Lenz & Staehelin in Geneva. Mr du Pasquier advises a number of Swiss and international financial institutions, as well as Swiss and offshore private equity, hedge funds and fund managers. He has been nominated by Chambers in 2008 as a leading individual in Banking & Finance and as regards Investment Funds. Mr du Pasquier is a frequent speaker at professional conferences on banking and financial law issues, as well as investment funds.

CEO, Fox Partnership group of companies,

based in Singapore

Simeon Fowler is the Co-founder and CEO of the Fox Partnership, a global private banking executive search firm. Prior to Fox Partnership Simeon was in Financial services for over 10 years. Simeon qualified with the Chartered Insurance Institution in 1995.

The Fox Partnership Group of companies was established over a decade ago to offer the world's best Private Banks a bespoke solution in the search for global talent. We have been tracking key talent for many years and advise when to approach these high caliber private bankers and to position their opportunities in a concise, compelling and thought provoking manner.

Fox has offices in London, Geneva, Singapore and Hong Kong. Our market knowledge and embedded contacts enable us to offer wider ranging strategic advice to Private Banks as well as timely and targeted talent hiring solutions. Our reputation of innovative thinking and expert knowledge on talent acquisition is industry recognized.

Justin Ong,

Partner, PricewaterhouseCoopers,

based in Luxembourg

Justin is a partner with PricewaterhouseCoopers Luxembourg, currently on a two year secondment from PwC Singapore. Justin has more than 19 years of experience working with wealth managers in Singapore, Asia and London. Prior to his secondment to Luxembourg in January 2011, Justin led the Asset Management Practice in Singapore and currently still serves as the Asia Pacific Private Banking Leader.

Justin leads a team in Asia which focuses on the Asian portion of the well regarded PricewaterhouseCoopers Global Private Banking Survey, which is carried out on a bi-annual basis, most recently in 2011. In this regard, he has provided industry briefings and carried out advisory projects for a number of private banks in Singapore, Hong Kong and Switzerland. His dealings with private banks includes business model and strategy reviews, human capital assessments, performance improvement reviews, regulatory advice and compliance training, among others. He has also been invited to speak at a number of private banking/wealth management conferences, including the International Private Banking Council Meetings and also helps private banks in running thought leadership sessions at management offsites and forums.

Most recently, Justin acted as the advisor to the Private Banking Advisory Group in Singapore, a think-tank comprising senior level private banking executives and sponsored by the Monetary Authority of Singapore, where the Singapore Private Banking Code of Conduct was born.

Justin has a Bachelor of Economics degree from Monash University in Australia, and is a full member of the Australian Society of Certified Practising Accountants as well as a practising member of the Institute of Certified Public Accountants of Singapore. He also holds the Investment Management Certificate (IMRO Full Version) issued by the Institute of Investment Management and Research in UK and acts as advisor to the CFA Institute's Examination Review Panel for the Certificate in Investment Performance Measurement.

Alois Pirker,

Research Director Wealth Management, AITE Group,

based in Boston, USA

Alois Pirker is a research director at Aite Group, LLC, specializing in trends in the wealth management market. He has published extensively on topics including the registered investment advisor space, financial planning, separately managed accounts, and advisor-focused platforms and tools.

Before joining Aite Group, Mr. Pirker was an Analyst within Celent's Securities & Investments Group, where he published several studies and advised clients on new strategic technologies in the financial services marketplace.

Prior to working for Celent, Mr. Pirker was an Associate Director of investment solutions at UBS Wealth Management in London. In this role he developed business requirements and managed the delivery of various initiatives targeted at the launch of UBS' separately managed accounts business within the five largest European wealth management markets (the U.K., Germany, France, Italy and Spain). Before assuming this role, he led a team of business analysts responsible for all data warehousing/reporting requirements for the implementation of UBS' European wealth management platform.

Before moving to London, Mr. Pirker was a data architect within UBS' enterprise data warehouse program in Switzerland.

Mr. Pirker holds BS and MS degrees (Diplom-Ingenieur) in applied computer science from the University of Klagenfurt in Austria. He also studied at the École Polytechnique Fédérale de Lausanne in Switzerland, where he wrote his master's thesis on data management. He is fluent in English and German and proficient in French.

Amin Rajan,

CEO, Create-Research

based in London, UK

Amin Rajan is the Chief Executive of the Centre for Research in Employment and Technology in Europe (CREATE) – a pan-European network of prominent researchers undertaking high level advisory assignments for the UK Government, City institutions, multinational companies and international bodies such as the EU, OECD and ILO.

He has also acted as a senior consultant to companies such as ABN-AMRO, Aegon Group, Barclays, BP, BT, Citigroup, Corning, Deutsche Bank, EDS, Fiat, Ford, GSK, HSBC, IBM, ICI, ICL, KPMG Legal & General plc, Lloyds TSB, Merrill Lynch Investment Management, Microsoft, Morgan Stanley, Motorola, Proctor & Gamble, Prudential, Rolls Royce, Royal Bank of Scotland, Royal SunAlliance, Shell, and UBS.

As well as appearing on radio and television regularly, he contributes feature articles to The Financial Times, Global Investor, The Guardian, The Sunday Times, and The London Evening Standard. He has published numerous books and articles on leadership, business cultures, socio-economic forecasting, globalisation, new technologies, diversity and new business models.
He has presented the results of his work at over 100 major events in the USA, Europe and Asia-Pacific in the last five years. His expertise covers, amongst others, leadership and new business models in financial services. He is the author of 11 best selling research reports. He is a visiting professor at the Cass Business School, London Metropolitan University, Centre for Leadership Studies at Exeter University, President of the Scientific Committee at Audencia – Nantes Ecole de Management in France, and on the Editorial Board for the Journal of Asia-Pacific Business. In 1998 he was awarded the Aspen Institute's Prize in leadership. It is a subject on which he has done extensive research involving some of today's outstanding business leaders. In two resulting publications, he has developed a close link between leadership, strategy and the emerging business models. His work has proved so influential that he now provides leadership coaching to Chief Executives, executive committees and investment specialists in different companies.

Ray Soudah,

Founder, MilleniumAssociates

based in Switzerland

Ray Soudah is the founding partner and chairman of MilleniumAssociates, the independent international M&A and Corporate Finance Advisory firm, based in Switzerland and the UK. Founded in 2000, MilleniumAssociates specialises in M&A and advisory services for the global financial services industry with particular focus on the global wealth and asset management sectors. As founding partner and chairman Ray takes a strategic advisory role, supporting the operational team and developing MilleniumAssociates' broad network of senior contacts with financial services companies, investors, institutions and sovereign funds globally.

Ray has enjoyed a long and varied career in the global financial services arena working in territories as diverse as the US, Asia, Middle East and Europe. Prior to forming MilleniumAssociates Ray was Managing Director and member of the Private Banking Management Board for SBC/UBS AG where he created and led the global corporate strategic acquisition and development team in asset/wealth management and private banking. Earlier positions include; Chief Investment Officer, Chief Financial Officer and member of the Executive Board of Cedel Bank (renamed Clearstream); Chief Investment Officer for the National Bank of Bahrain including Head of International Banking and Private Banking; CEO of Hong Kong, CEO of Japan, Head of Global Capital Markets office (London) and head of FIG for Midland Montagu Investment Banking and MD/CEO of Midland Montagu Securities as well as various senior positions within Citigroup, including Head of Asia Pacific Treasury and Capital Markets.

Ray is a Harvard Business School & INSEAD Alumnus. He has multicultural, multilingual wealth management and private banking/investment banking expertise. Ray is a patron of the British Swiss Chamber of Commerce and speaks English, French, Greek and Japanese.

Dr. Stefan Jaecklin,

partner at Oliver Wyman,

Based in New York, USA

Stefan Jaecklin has 15 years experience in consulting and more than 19 years experience in capital markets activities. Stefan has founded our global wealth and asset management. He joined the company in 1997. Stefan has led a range of strategy projects with asset/wealth managers, investment banks, as well as regional banks and exchanges. He has advised asset and wealth managers in topics ranging from overall strategy to production set-up questions and distribution strategies.

He has worked extensively in all the adjacent businesses, including custody, investment banking, exchanges and family offices. Stefan has co-authored the Oliver Wyman report "Future of Private Banking: a Wealth of Opportunity" and a number of papers relating to wealth management, including papers on the new crossborder private banking requirements, new advisory models, the FX risk in Private Banking, alternative investments and transaction related integration challenges. Before joining Oliver Wyman, Stefan worked at Credit Suisse in private banking.

Stefan Jaecklin holds a doctorate in International Economics of the Institut Universitaire de Hautes Etudes Internationales (Université de Genève, Suisse), a M.Soc.Sci (Economics) of the National University of Singapore and is a Chartered Financial Analyst (CFA).