



VALENTINE THOMAS

— & PARTNERS —

People Moves | Wealth
Management

Q1 2024

People Moves | Wealth Management

Please see below a quarterly update on the latest people moves within the wealth management industry. Please do get in contact with the team if you would like to discuss any topics relating to talent in the investment or wealth management areas.

- **Alpha FMC** has hired **Scott Lee** as **Executive Director** in its UK Wealth Management and Private Banking Team. **Scott** joins from Sionic where he was a Managing Partner.
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- **Arbuthnot Latham and Co** has appointed **Carolyn Moore** as **Head of Executives and Professionals, Private Banking**. **Carolyn** joins from Coutts where she was a Director and Broker Team Lead.
- **Arbuthnot Latham and Co** has appointed **Mark Penny** as **Director of Private Banking** in its media team. **Mark** joins from Adam & Company, where he was a Private Banking Director within the Media, Entertainment, and Sport market. Additionally, **Amit Mohda** has joined the firm as **Head of Middle East Clients**. **Amit** was formerly Director of Private Banking at Kleinwort Hambros.
- **Ascot Lloyd's** Chief Executive, **Nigel Stockton**, is **leaving** the firm.
- **atomos** has appointed **Eleanor Ingilby** as **Head of High Net Worth**, **Jonty Warneken** as **Head of the Harrogate Office**, and **Stuart Rosling** as **Head of Portfolio Management**.
- **Barclays** has promoted **Sasha Wiggins** to **Chief Executive** of its Private Bank and Wealth Management Business. Additionally, Barclays Private Bank has appointed **Elizabeth Weir** as **Head of UK Domestic**, **Mark Mills** as **Head of Investment Distribution** for the UK and Crown Dependencies, and **Liz Weir** as **Head of UK Domestic**.
- **Bentley Reid** has appointed **Paul O'Neill** as **Chief Investment Officer**. **Paul** was formerly Head of UK Asset Management and Research at Butterfield Private Bank.
- **Brooks Macdonald** has appointed **Alex Charalambous** as **Head of Wealth** and promoted **Mark O'Connor** to **Managing Director** for the Channel Islands and Isle of Man, as **Richard Hughes** departs. In addition, Chief Investment Officer, **Edward Park**, has **resigned**. Furthermore, Senior Investment Director and Head of UK Private Clients, **Stewart Sanderson**, Senior Financial Planning Director, **Simon Whitby**, and Financial Planning Director, **Doron Grossobel** have **left** the firm.
- **Brown Shipley** has appointed **Helen Whelan** as **Chief Risk Officer**. **Helen** was previously Head of Risk at LGT Wealth Management. Additionally, **Lisa Morrison** and **Amir Bayram** have been appointed as **Client Advisers** to its office in Leeds. **Lisa** joins from UBS Wealth Management where she was a client adviser, and **Amir** was formerly a Relationship Manager at Royal Bank of Canada.
- **C Hoare & Co** has promoted **Abigail Malortie** to **Partner**.
- **Close Brother Asset Management** has appointed **Annabel Barrow** as **Senior Investment Manager**, **Matt Green** as **Senior Investment Director**, and **Jonathan Follows** as a **Senior Investment Manager**. Furthermore, **Matt Hearsam** has joined as **Senior Investment Manager**.
- **Deutsche Bank** has promoted **Kirsten Oppenländer** from Co-Head Regulatory & Exam Management to **Head of Service Solutions and Operations** in its private banking division.
- **EFG International** has appointed **Manuel Blanco** as **Head of Private Banking Gstaad and Greater Berne Area**, and **Stephan Uebersax** as **Head of Private Banking for St Moritz and Engadin**.
- **Evelyn Partners** has appointed **Andrew Middleton** as **Group Chief Marketing and Commercial Officer**, **Daniel Lewis** as **Investment Director** in its Chelmsford office, and **Edward Park** as **Chief Asset Management Officer**. Furthermore, **Matt Dickens** has been hired as a **Financial Planning Director**, and **Lauren Glaister** has joined its Leeds investment management team as **Partner**.
- **GAM** has hired **Paul Markham** as **Investment Director** to lead global growth equities and disruptive growth teams. **Paul** was most recently Head of Global Opportunities Equities at Newton Investment Management.

- **Hampden & Co** has appointed **Martin Hillier** as **Intermediary Relationship Director**. Martin was formerly a Senior Business Development Executive at Weatherbys Private Bank.
- **Hay Hill Wealth Management** has appointed **Martin Baines** and **Dr Timothy Grasby** as **Directors**. Martin was formerly Chief Executive of Quilter and Quilter Cheviot Investment Management, and Timothy is the founder of the Heligan Group.
- **HBK Investments Advisory** has appointed **Sobhi Tabbara** as **Partner**. Sobhi was previously Global Market Head of Middle East & North Africa at HSBC.
- **HSBC** has promoted **Anthony Hingley** from Managing Director for Global India, MENA, and Europe, to **Head of Global Private Banking** in the Channel Islands and Isle of Man.
- **James Hambro & Partners** has appointed **Gareth Jenkins**, Financial Planner, and **Mark Richmond-Watson**, Portfolio Manager, as **Partners**.
- **JM Finn** has appointed **Mark Haines** as **Chief Operating Officer**. Mark was formerly Chief Technology Officer at Brewin Dolphin.
- **JP Morgan** has appointed **Rima Pau** and **Narina Tailor** as **Client Advisors**. Rima and Narina both join from Citi Private Bank. Additionally, **Obaid Choudhry** and **Anthony Gifford** have joined as **Executive Directors**.
- **Julius Baer** has hired **Richard Griffiths**, **Asad Zaidi**, and **Utpal Garware** as **Relationship Managers**.
- **Kingswood** has hired **Vinoy Nursiah** as **Chief Financial Officer** and **Bryan Parkinson** as **Managing Director, Head of Wealth Planning**. Vinoy was recently CFO at CSC Global Financial Markets.
- **LGT Wealth Management** has promoted **Alice Gerry**, **Andrew Archer**, **Daniel Fresnais**, **Esther Clark**, **Henry Wilson**, **Robert Hardy**, **Scott Prout**, **Caroline Tye**, **Laurence Gagen**, **Matthew Grange**, and **Gregg Henderson** as **Partners**.
- **LGT Wealth Management** has promoted **Barbara Kane** from Head of Compliance and Legal to **Chief Risk Officer**.
- **Lombard Odier Investment Managers** has appointed **Mona Shah** as **Senior Sustainability Strategist**, **David Barker** as **Senior Wealth Planner** for the UK Team, and promoted **Aude Dhuivonroux** to **Head of LOIM in France**.
- **NatWest** has appointed **Emma Crystal** as **Chief Executive** of the Wealth Business. Emma joins from UBS where she was heading a sustainable finance division.
- **Nedbank Private Wealth** has appointed **Richard Sayers** as **Head of Client Development** in their Jersey office. Richard previously Co-Founded and was a Client Services Director at Enhance Group.
- **Quilter Cheviot** has hired **Caroline Simmons** as **Chief Investment Officer**, **Craig Ross** as **Head of Adviser Propositions**, and **Ryan Medlock**, **Filipo Madonia**, and **Nick Davison** as **Investment Directors**.
- **Quintet Private Bank** has appointed **Christine Lynch** as **Group Chief Risk Officer**. Christine was formerly Chief Risk Officer for Wholesale and Markets and Securities Services, and Head of Enterprise Risk at HSBC.
- **Rathbones** has hired **Nick Beanland**, **David Wainman**, and **David Shorrock** as **Wealth Managers**. Furthermore, Rathbones has appointed **Andrew Robins** as **Client Development Director** and **Joe Peacock** as **Investment Manager**.
- **Raymond James Wealth Management** has appointed **Francesca Hampton** as **Group Chief Financial Officer**, and **Sandy Kinney Pritchard** as **Chair of the Board and Independent Non-Executive Director**.
- **RBC Brewin Dolphin** has appointed **Dan Sawyerr** as **Wealth Director**, **Matt Baldwin** as **Assistant Director**, **Simon Reed** as **Divisional Director of Investment Management**, and **Joseph Smith** and **Shazna Bishop** as **Financial Planners and Divisional Directors**.
- **Saltus** has hired **Alistair Stuart** as **Chief Operating Officer**. Alistair joins from Nationwide Building Society where he was Director of Operations Transformation.
- **Saxo Bank** has promoted **John Carmichael** from Executive Director, Chief Audit Executive, to **Chief Risk and Compliance Officer**. John will also become a member of the board of management and executive team. Additionally, Chief Executive, **Simon Camilleri**, has **left** the firm.
- **Sarasin & Partners'** Chief Investment Officer, **Jerry Thomas**, has **left** the business.
- **Schroders'** Managing Director of Benchmark Financial Planning, **Tim Sargisson**, has **left** the firm.
- **Seven Investment Management's** Wealth Manager, **Peter Sleep**, has **left** the firm.

- **St James’s Place** has appointed **Corinne Lord** as **Senior Investment Specialist**. Corinne joins from Cazenove Capital where she was an Investment Product Specialist.
- **Standard Chartered** has hired **Diego De Giorgi** as **Group Chief Financial Officer**. Diego was previously Joint Chief Executive at Pegasus Europe.
- **Tideway** has promoted **Neil Croxford** from Chief Operating Officer to **Chief Executive**.
- **Titan Private Wealth** has appointed **Matt Beddall** as **Joint Chief Executive**. Matt was previously Divisional Director and Head of the Sheffield office at Investec Wealth & Investment.
- **Troviq Private Markets** has hired **Ed Cotton** as **Managing Director** to focus on Business Development. Ed joins from Moonfare, where he was Head of UK and Ireland.
- **UBS** has promoted **Victoria Hagmann** from Head of Europe International North High Net Worth and Private clients to **Head of Wealth Management for the UK, Jersey, and Guernsey**. Additionally, Senior Advisor and former Chief Executive Officer EMEA, **Francesco De Ferrari**, has **left** the firm.
- **Union Bancaire Privée** has appointed **Boryana Perfanova** as a **Senior Investment Adviser**. Boryana was formerly Director at Brown Shipley.
- **Verso Investment Management** has appointed **Tim Cockerill** as **Investment Strategy Director**. Tim was formerly an Investment Director at Rowan Dartington.
- **Waverton Investment Management** has appointed **Alexander Cottrell** as **Portfolio Manager**. Alexander was recently an Investment Director at Odey Wealth.



**All information is obtained from publicly available sources*

The Team

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Valentine Thomas & Partners is a leading investment and wealth management executive search firm covering the EMEA markets.

