



VALENTINE THOMAS

— & PARTNERS —

People Moves | Wealth  
Management

Q3 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.

- **7IM** has appointed **Matteo Ruozzo** as a **Senior Quantitative Investment Strategist**. Additionally, **Asim Qadri** and **Brian Leitao** have joined as **Investment Managers**.
- **Allfunds** has hired **Paola Rengifo** as **Head of Global Operations** and **Miguel Ángel Treceño** as **Chief Data Officer**.
- **Arbutnot Latham** has appointed **Andrew Grimes** as **Director** in its International Banking Team. Andrew was formerly Executive Director at Coutts. Additionally, **Sean Taylor** joins as **Director of Intermediary Sales** from Canaccord Genuity Wealth Management, where he was a Director.
- **ARC Research** has appointed **Shaun Le Messurier** as **Client Director**. Shaun was formerly Director at Odey Wealth Management.
- **Ascot Lloyd** has appointed **Francis Jackson** as **Chief Executive**, replacing **Nigel Stockton** who is **stepping down**. Francis was previously Chief Executive of RBC Investor Services.
- **Bank of Scotland's** Private Client Manager, **Iain Morrison**, has **left** the firm.
- **BNY** has appointed **Jose Minaya** as **Global Head of Investments and Wealth**, taking over from **Hanneke Smits**, who has **retired**. Jose was formerly President and Chief Investment Officer at Nuveen.
- **Bordier & Cie UK's** Chief Executive, **Jamie MacLeod**, has **left** the firm.
- **Brooks Macdonald** has promoted **Andrew Rockey** to **Head of Investment Solutions** for its business-to-business BM investment solutions (BMIS) service. Additionally, **Greg Mullins** has joined the firm as **Head of Adviser Solutions** and **Katherine Jones** as **Chief Financial Officer and Executive Director**.
- **Brown Shipley** has appointed **Cara Walters** as **Head of HR**. Cara was formerly Head of HR Operations at Charles Stanley. Additionally, **Matthew Noyce** has joined as a **Client Adviser** from UBS where he was a Director, Client Adviser.
- **C Hoare & Co** has appointed **Oliver Dean** as a **Senior Relationship Manager**. Oliver was formerly Sheffield Branch Manager at Handelsbanken.
- **Canaccord Genuity Wealth Management UK and Crown Dependencies** has appointed **Lorraine Armstrong** as a **Senior Investment Director** in its Newcastle office, and **Kathryn Sargent** as a **Business Development Director** within its IFA Sales Team. Additionally, **Paul Fielding** has joined as an **Investment Director** to its Birmingham team. Furthermore, **Tom Lane** has been hired as **Chief Commercial Officer**.
- **Citi Wealth** has appointed **Yeo Wenxian** as **Head of Wealth for the Asia South region**. Yeo will also become Chief Executive of Citibank Singapore and joins from DBS where she was Head of Treasuries for Singapore.
- **Coutts' Interim CEO, Mohammad Kamal Syed**, has **left** the firm.
- **Davies** has appointed **Amber Wilkinson** as **Group Chief Financial Officer**. Amber was formerly CFO at DLA Piper.
- **Davy** has appointed **Gavin Kelly** as **Chief Executive and Executive Director of its Board**. Gavin was formerly Chief Executive of Bank of Ireland.
- **Deutsche Bank** has appointed **Hugo van Kattendijck** as **Head of External Asset Managers** for Private Bank Emerging Markets, and **Adam Proctor** as **Managing Director and Senior Relationship Manager**. Additionally, **Puneesh Nayar** and **Nick Malik** have joined as **Market Heads for the Global South Asia and Africa Franchise**.
- **Edmond de Rothschild** has hired **Romain Segura** as a **Wealth Planner**. Romain was formerly a Wealth Planner and Tax Specialist at UBS. Additionally, Chief Executive of the Middle East and North Africa, **Ali Raza** and International Private Banking Head, **Hervé Ordioni**, have **left** the firm.
- **EFG Bank von Ernst** has hired **Ruurd Boomsma** as **Head of Intermediaries**. Ruurd was previously Head of Trustees, Lawyers, and Family Offices at VP Bank.
- **EQ Investors** has appointed **Matt Wiles** as **Head of Fund Research**. Matt was formerly led the firm's sustainable fund research at LGT Wealth Management.

- **Evelyn Partners** has appointed **Charlotte Platts** as **Regional Managing Partner** for its Financial Planning Business across Northern England, Scotland, and Northern Ireland. Additionally, **Ben Sims** and **Joe Sheehan** have joined as **Business Development Managers**. Furthermore, **Rachel Bleakley** as an **Associate Director** in its Birmingham Financial Planning team.
- **Farrer & Co** has appointed **Abigail Nott** as **Senior Counsel**. Abigail was formerly Counsel at McDermott Will & Emery UK.
- **GAM** has appointed **Randel Freeman** as **Co-Chief Investment Officer** of its new Alternative Investments unit, and **Andrea Astone** as a **Client Director**. Additionally, **Stephanie Maier**, Chief Sustainability Officer, has **left** the firm. Furthermore, **Jesco Schwarz** has joined as **Head of Germany and Austria Distribution**.
- **GSB** has appointed **Paul Waterman** and **Craig Holding** as **Partners** in its wealth division based in Dubai. Paul was formerly a Chartered Wealth Manager at Skybound Wealth Management and Craig joins from Abacus Financial Consultants where he was a Partner.
- **Handelsbanken** has promoted **Catharina Belfrage Sahlstrand** from Head of Communications and Sustainability to **Head of Sustainability**.
- **HSBC** has appointed **Barry O’Byrne** as **Chief Executive of Global Wealth and Personal Banking**, taking over from **Nuno Matos** who has **stepped down**.
- **Indosuez Wealth Management** has appointed **Omar Abouzeid** and **Jeremy Rouland** as **Senior Private Bankers**, and **Catherine Samson** as **Head of Credit Structuring**. Additionally, **Ezgi Bosson-Cagdas**, **Marcelo Rezende**, and **Renzo Peroni** have joined as **Relationship Managers**.
- **ING** has appointed **Anneka Treon** as **Global Head of Private Banking, Wealth Management and Investments**. Anneka was previously Chief Economist at Van Lanschot Kempen.
- **Investec Wealth & Investments** has named **Fraser Ford** as **Head of Portfolio Manager**, taking over from **Jon Walker**, who has **left** the firm.
- **J Stern & Co** has appointed **Som Bhattacharya**, **Thomas Steffen**, and **Steve Butler** as **Senior Client Directors** in its client, sales and distribution team.
- **JP Morgan Private Bank** has appointed **Joe Jones** as **Vice President and Client Adviser** and **Patrick McDermott** as **Executive Director and Senior Client Adviser** in its UK Team. Additionally, **Gillian Murray** has joined as **Head of its Private Bank in Scotland**.
- **Julius Baer** has appointed **Axel Hoffmans** as **Chief Executive** in Germany from 2025, and **Stefan Bollinger** as **Chief Executive**. Additionally, **Patrick Prinz** has been promoted to **Head of Swiss Market** and **Urs Brudermann** has joined as **Group Head of Thailand**. Furthermore, **Reto Buerer** has been hired as **Team Head for Asia Switzerland**, **Claudia Petersen** as **Head of its Private Markets division**, based in Zurich, and **Ashwin Jayaram** as **Team Head of Global NRI in Singapore**. Finally, **Andreas Weisshaupt** has joined as **Head of the Lucerne Branch**, and **Denise Cockrem** and **Sam Tymms** as **Independent Non-Executive Directors**.
- **Kingswood Holdings** has appointed **Peter Coleman** as **Interim Chief Executive**. Peter was previously Chief Commercial Officer at Succession Wealth.
- **Lennertz & Co** has appointed **Achim Uebele** as **Head of Family Office**. Achim was formerly Chief Financial Officer at Tegus Medical.
- **LGT Wealth Management** has appointed **Simon Reeks**, **Fahim Amdani**, and **Michael Waddington** as an **Investment Manager**, **Wealth Manager**, and **Office Manager**, respectively.
- **Lloyds Private Bank** has hired **Etiksha Patel** as **Head of Private Banking** in its Sports, Entertainment and Entrepreneurs Team. Etiksha was formerly Head of Professionals at Metro Bank.
- **Lombard Odier** has hired **Chris Bonello** as **Head of UK and Northern Europe in Zurich**, and **Frédéric Praz** as **Head of Private Client Activities for the France, Belgium and Luxembourg Regions**. Additionally, **Xavier Bonna** has been promoted from Senior Private Banker to **Managing Partner**, taking over from **Alexandre Zeller** who has **stepped down**.
- **London & Capital** has appointed **James Barrie** as an **Executive Director** in its Private Investment Office Team. James was previously Client Partner at Artorius. Additionally, **Nicole Ralph** has joined as **Executive Director** in its Private Wealth Team. Nicole was formerly a Senior Financial Adviser at Tanager Wealth Management.
- **M&G Wealth’s** CEO, **Caroline Connellan**, is **leaving** the firm at the end of the year.

- **Moonfare** has hired **Adam Banks** as **Head of Asia-Pacific**, based in Singapore. Adam was formerly Principal at Blackstone.
- **Nedbank Private Wealth** has appointed **Simon Gibbons** as **Executive Head of Wealth Management**. Simon was formerly Head of Wealth Management at Fidelity International. Additionally, **Philip Legrand** has joined as a **Private Banker** in its Jersey team.
- **Oakglen Wealth** has promoted **Allan Stewart** from Director to **Managing Director of its Jersey business**, replacing **David Baker**, who is **retiring**.
- **One Four Nine Group** has appointed **Martyn Southam** as a **Regional Director**. Martyn was previously Commercial Director at Salisbury House Wealth.
- **Progeny** has appointed **Andrew Priestley** as **Head of Client Value Proposition**.
- **Ptarmigan Capital** has appointed **Ed Roe** as a **Senior Fund Manager**. Ed joins from Ruffer where he was an Investment Manager.
- **Quilter** has appointed **Sarah Houlston** as **Chief Operating Officer**. Sarah was formerly Chief Operating Officer at RBC Brewin Dolphin, and succeeds **Karin Cook**, who is **retiring** at the end of the year.
- **Raffles Family Office** has appointed **Terence Chow** as **Group Chief Operating Officer**. Terence was formerly Chief Executive for Wealth Management in Asia at RBC.
- **Rathbones Investment Management** has appointed **Richard Robson** as an **Investment Director**, and **Simonetta Rigo** as **Chief Client Officer**. Additionally, **John David** is **stepping down** and will be replaced by **David Cox** as **Head of Rathbone Greenbank**. Furthermore, Rathbones have added three hires to its Cambridge office; **Pam Beith** and **Isobel Gingell** as **Investment Directors**, and **Sam Garrad** as an **Assistant Investment Manager**.
- **Ravenscroft's** Chief Investment Officer, **Kevin Boscher**, is **relocating to Jersey**, and **Haydn Taylor** has been named as **Chairman**. Haydn will remain as the firm's Group Head of Advisory.
- **RBC Wealth Management** has hired **Daniel Soo** as **Managing Director and Market Head**, and **Lawrence Yap** as **Executive Director in Singapore**. Additionally, **Joe Pearce** has been promoted to **Head of Banking and Custody**, and **David Bailey** has joined as **Chief Operating Officer**.
- **Rothschild & Co** has promoted **James Morrell** from Head of Front Office, Managing Director to **Deputy Chief Executive**, and appointed **Daniela Jaume** as **Director of Strategic Relationships**. Daniela joins from James Hambro & Partners where she was Business Development Director.
- **Saltus** has appointed **Nick Heath** as **Head of Relationship Management**. Nick was previously a Client Relationship Manager at YOU Asset Management.
- **SG Kleinwort Hambros** has appointed **Karim Chowdhury** as **Director** in its Private Banking Team. Karim was previously Vice President of Private Banking at Butterfield Group. Additionally, **Helen Gammons** has joined as a **Director** in its private bank, focused on Ultra-High Net Worth Clients.
- **Sparrows Capital** has appointed **Arnie Millington** as **Head of Partnerships**. Arnie was formerly a Business Development Manager at Seven Investment Management. Additionally, **Helen Mason** has joined as **Marketing Manager** from Floreat Group where she was a Marketing Manager.
- **St James' Place** has appointed **Andy Ford** as **Head of Responsible Investment**. Andy was previously Head of ESG Investment Directors at Aviva Investors.
- **Standard Chartered Bank** has promoted **Jean Lu** from Head of CCIB & Deputy CEO of China to **Chief Executive of China**.
- **Stonehage Fleming Investment Management** has appointed **Prandhana Naidu** as **Senior Equity Research Analyst**. Additionally, Stonehage Fleming has appointed **Mathew Powley** as **Partner**, **Eleana Watts** as **Director**, and **Guy Brukman**, **Mark Swart**, **Nicholas Smith**, and **Priyanka Hindocha** as **Partners**. Furthermore, **Hattie Graham** and **Patrick Lynch** have been named **Directors**. Finally, **Tanja Bernat** has been appointed as **Director and Head of Relationship Management** and **Jayne Franks** as **Group Head of HR**.
- **Succession Wealth** has appointed **Graham Nicoll** as **Director of Wealth**. Graham joins from Alantra where he was a Managing Director.
- **The Hottinger Group** has appointed **Andrew Butler-Cassar** as **Head of Private Clients**. Andrew was previously Head of London at Brown Shipley.

- **Titan Wealth** has promoted **Ian Wood** from Chief Investment Officer of Titan Private Wealth to **Group Chief Investment Officer** of Titan Investment Solutions.
- **UBS Global Wealth Management** has appointed **Jeremy de Lagarde** as a **Client Adviser** and **Christian Koppenhöfer** as **Head of Global Wealth Management Strategy**. Additionally, **Chris Sutherland** and **Grant Hamilton** have joined as **Client Advisers within the Private Client Team** in its Jersey office. Furthermore, **James Williams** has been hired as **Managing Director** advising UHNW clients.
- **Union Bancaire Privée** has appointed **Teresa Lee** as **Region Head of North Asia and Chief Executive for Hong Kong**. Teresa has joined from Bank of Singapore where she was Vice Chair of Greater China.
- **Verso Investment Management** has appointed **James Robertson** as **Client Director**. James joins from Brown Shipley. Additionally, **Will Vaughan** has also joined as **Client Director** from Brown Shipley where he was a Client Adviser.
- **Wealth Club** has appointed **Isaac Stell** as **Investment Manager**. Isaac was previously Fund Research Manager at Parmenion.
- **Wealthtech Iress** has promoted **Alistair Morgan** from Chief Financial Officer for UK to **Executive Managing Director, UK**.



*\*All information is obtained from publicly available sources*

# The Team

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