

# VALENTINE THOMAS

— & PARTNERS —

People Moves | Wealth  
Management

Q4 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.

- **Affinity Private Wealth** has promoted **Jon Proudfoot** from Investment Director to **Chief Investment Officer**.
- **Barclays** has appointed **Mohammad Syed** as **Head of its Private Bank and Wealth Management Services in the UK and Crown Dependencies**. Mohammad was formerly Interim Chief Executive at Coutts and NatWest. Additionally, Barclays Private Bank and Wealth Management has named **Wayne Hawkes** as a **Commercial Director and Member of the Executive Committee**. Wayne was formerly Head of Institutional Client Solutions for EMEA at Goldman Sachs.
- **BNP Paribas** has promoted **Bruno Bousard** from Global Head of Treasury to **Head of Territory and Chief Executive** of its South Asia, Taiwan branches. Additionally, **Juan de Gonzalo** has joined as **CEO of Wealth Management in Spain**. Juan was formerly Head Bank for Entrepreneurs at Deutsche Bank.
- **Bonhôte** has appointed **Marc Brodard** as **Chief Client Officer**. Marc was previously Head of Private Banking at Schroder & Co Bank AG. Additionally, **Kim-Andrée Potvin** has been promoted from Chief Operating Officer to **Chief Executive**.
- **Bordier UK** has promoted **Ian Heap** from Director of Portfolio Management and Board Director to **CEO**.
- **Brooks Macdonald** has hired **Gavin Neilson** as **Interim Chief Operating Officer**. Gavin joined the firm in August 2024 as Chief Technology Officer on an indirect contract.
- **Brown Advisory** has appointed **Tessa Pilkington** to its **International Private Client Portfolio Management Team**. Tessa was formerly a Managing Director at ALTi Tiedemann Global.
- **Brown Shipley** has appointed **Robbie Hewitt** as **Wealth Planner** in its Edinburgh office. Robbie was previously a Chartered Financial Planner at JKFS. Additionally, Chief Executive, **Calum Brewster**, has **stepped down**, with **Robert Kitchen** taking on the role as **Interim Chief Executive**. Furthermore, **Lindy Kroese** has joined as **Wealth Planner** in its Leeds team.
- **C Hoare & Co** has appointed **Mark Gaisford** as **Senior Relationship Manager**. Mark was formerly Director of Private Banking at Coutts & Co.
- **Callanish Capital** has appointed **Haig Bathgate** as **Director**. Haig was formerly Head of Investments at atomos wealth.
- **Canaccord Wealth** in the Crown Dependencies has appointed **Aiysha Prow** as a **Stockbroking Director** in its Jersey office. Aiysha was previously a Premier Relationship Director at HSBC Expat.
- **Cazenove Capital** has appointed **Sandra Dailidyte** as **Portfolio Manager** in Edinburgh. Additionally, **Hana Griffin** and **Aaron Steel** have joined as **Wealth Planners**, and **Nicholas Irby** has been named **Wealth Planning Director**. Furthermore, **Paul Andrew** has joined as **Wealth Planning Director** for clients in the North of England. Finally, **Dominic Brentnall** has joined as **Portfolio Director** in Birmingham.
- **CBH Bank** has appointed **Simon Benhamou** as **Chief Executive** and **Alfonso Liparulo** as **Head of Private Banking**.
- **Charles Stanley** has appointed **Charlotte Aspinall** as a **Senior Investment Manager** based in its Tunbridge Wells office. Charlotte joins from Mattioli Woods where she was a Senior Investment Manager, chair of its equity selection committee, and a member of the investment policy committee.
- **Citi** has appointed **Anne McCosker** as **Head of Lending** for its wealth division. Anne was formerly Global Head of Private Bank Lending and Origination at Goldman Sachs. Additionally, **Penny Lovell**, Managing Director at Citi Private Bank, has **departed**.
- **Cripps** has appointed **Kitty Sokol** as a **Partner in its Private Wealth Team in the London Office**. Kitty joins from The Burnside Partnership where she was a Partner.
- **Deutsche Bank Private Bank** has appointed **Paul Handley** as **Managing Director and Market Head for South East Asia (SEA)** focusing on Thailand. Paul was previously Managing Director at HSBC Global Private Banking. Additionally, Deutsche Bank has named **Geraldine Chow** as **Chief Operating Officer for Singapore Wealth Management**.
- **EFG Bank** has appointed **Seamus Yin** as **Market Group Head – Hong Kong & China, Ultra Clients**. In addition, **Miao Miao** and **Lianghan Chen** have been

named as **Team Heads and Client Relationship Officers** respectively, with Deputy Chief Executive, **Gabrielle Branson, leaving** the firm. Furthermore, EFG Harris Allday has hired **Edward James** as **Managing Director**, taking over from **Richard Killingbeck** who is **stepping down**.

- **Evelyn Partners** has hired **Matthew Spencer** as **Head of Intermediaries**, succeeding **Craig Wright**, who will be **returning home** to Australia. Matthew was formerly Managing Director at Close Brothers Asset Management. Additionally, **Mini Corden-Lloyd** has joined as **Financial Planner** from Coutts where she was an Associate Director, Wealth Management.
- **EY** has promoted **Martina Keane** from EMEA Financial Services Deputy Managing Partner and COO to **UK and Ireland Financial Services Leader**.
- **Goldman Sachs** has promoted **Robert Mullane** from Head of EMEA Alternative Capital Markets Group within Asset and Wealth Management to **Co-Head of Private Wealth Management EMEA**.
- **Handelsbanken** has appointed **Nish Divecha** as **Private Banking Manager**. Nish was formerly Relationship Manager at HSBC.
- **HSBC** has appointed **Olga Kucherenko** as **Senior Adviser** in the family office, governance & philanthropy team, **Annie Lim** as **Global Private Banking Head of its Singapore Desk**, and **John Shipman** as **Interim Chief Executive of its Swiss Private Bank and Country Head of HSBC Switzerland**, whilst Chief Executive of Global Private Banking and Wealth, **Annabel Spring**, is set to **leave** the firm. Additionally, HSBC Private Bank has appointed **Nick Wolf** as **UK High Net Worth London and South Regional Head and Head of UK Private Clients**, **Rebecca Boardman** as **UK HNW North and Midlands Head**, and **Kirsty Moore** as **Head of UK Client Delivery and Proposition**. Furthermore, HSBC PB has named **Marnix Rosendaal** as **Desk Head of Netherlands**, and **Patrick Rutgers** and **Ruud van Haperen** as **Senior Relationship Managers**. Finally, HSBC Global Private Banking has hired **Gabriela Andino-Benson** as **Global Ultra-High Net Worth Business Manager** and **Eric Ingber** as **US Head of Ultra High Net Worth**.
- **Hundle** has appointed **Kate Forsyth** as **Deputy Chief Investment Officer**. Kate was formerly an Investment Specialist at Ruffer.
- **Hurst Point** has named **Michael Bishop** as **Managing Director of its Investment Management Division**. Formerly, Michael was Head of Wealth Management at WH Ireland.
- **Indosuez Wealth Management** has appointed **Laurent Proutière** as **Chief Executive for Asia and its Singapore Branch Manager**. Laurent was formerly Head of International Trade and Transaction Banking for Asia Pacific at Credit Agricole CIB.
- **JM Finn** has appointed **Jon Cunliffe** as **Investment Office Head**. Jon joins from Charles Stanley where he was Chief Investment Officer.
- **JP Morgan Private Bank** has appointed former UK Domestic Head of Barclays Private Bank, **James Todd**, as **Domestic Market Team Lead**. Additionally, **Gregor Bollen** has been recruited as **Managing Director** in its Amsterdam Office. Gregor was formerly Head of Northern and Central Europe at Citi Private Bank.
- **Julius Baer International** has appointed **Denise Cockrem** and **Sam Tymms** as **Non-Executive Directors**. Additionally, **Viktoras Vatinas** has been named as **Head of Private Markets Investments**. Furthermore, Julius Baer has hired **Selami Oezkan** as **Senior Relationship Manager**, and **Joshua Braun**, **Thierry Dobler**, and **Elia Schärer** as **Relationship Managers** in its St Gallen location.
- **Killik & Co** has promoted **Clem MacTaggart** and **Sarah Threadgould** to **Managing Partners**. Clem and Sarah were promoted from Chief Strategy Officer and Chief Marketing Officer, respectively.
- **Kuwait Finance House** has appointed **Alan Higgins** as **Group Chief Investment Officer**. Alan was formerly Managing Director at Coutts.
- **LGT Wealth Management** has promoted **Phoebe Stone** from Partner to **Chief Sustainability Officer**. Additionally, **Rory Whitmore** has joined as an **Investment Manager** in its Birmingham Office from Evelyn Partners where he was an Investment Director.
- **Lombard Odier** has hired **Mark Goddard** as **UK Chief Executive**, and **Stéphane Python** as **Local Managing Director** of its office in Fribourg. Additionally, Lombard Odier has named **Jessica Rabut** as **Chief Executive** of its Europe Branch and **Stephane Herrmann** as **Chief Operating Officer** for the firm's private clients unit.
- **Moonfare** has promoted **Magnus Grufman** from Chief Investment Officer to **Chief Operating Officer**, and appointed **Sam Attwood** as **Regional Head of UK**. Sam previously worked in client services for Hg Capital.

- **Oakglen Wealth** has appointed **Charlie Nicholls** as **Financial Controller**. Charlie was previously Associate Director Group Finance at JTC Group.
- **Oberon Investments** has promoted **Adam Herringer** from COO of Capital and Head of Change to **Group Chief Operating Officer** and a Board Member. Additionally, **Richard Penny** has been named as a **Fund Manager** as part of a fund transfer deal.
- **Perspective Financial Group** has appointed former Chief Operating Officer of Kingswood, **Harriet Griffin**, as **Chief Operating Officer**.
- **Pictet Wealth Management** has hired **Alison Lim** as **Chief Executive** of its Singapore branch. Alison joins from BNP Paribas Wealth Management where she was Head of South East Asia Markets. Additionally,
- **Progeny** has appointed **Chris Guy** as **Chief Executive of its Singapore office**. Previously, Chris was APAC Markets Head of Trading and Risk Control at Citi.
- **Quilter Cheviot** has appointed **Colin Rowe** as **Head of Advice**, subject to regulatory approval. Colin was formerly Managing Director at 7IM. Additionally, **Nick Wood** has been promoted from Head of Investment Fund Research to **Head of Regional Offices**.
- **Rathbones** has promoted **Imogen Carter, Hasan Chakarto, Jake Clothier, Joel Swift, and Giles Wood** to **Investment Managers**. Additionally, **Gareth Evans** has been appointed as an **Investment Director** in its Cheltenham Office, and **Tessa Curtis** has been named as the firm's first **Director of Corporate Communications and Affairs**.
- **Rothschild's** Chief Finance Officer, **Christian Bouet**, is **stepping down** from his operational role in Switzerland, with current finance director for wealth management Switzerland and international subsidiaries, **Patrick Eisenring**, taking over as **CFO**.
- **Schroders Personal Wealth** has appointed **Katie Young** and **James Harris** as **Head of Commercial** and **Head of Advice Services and Investment Engagement**, respectively. Katie joins from Coutts & Co where she was Managing Director, Head of Lending, and James was formerly a Consultant at Schroders Personal Wealth.
- **Societe Generale** has promoted **Mathieu Vedrenne** from Deputy Head of Private Banking to **Head of Private Banking Activities**.
- **St James' Place** has promoted **Alexandra Loydon** from Head of Private Client Division to **Director of Advice Policy and Operations**, whilst Chief Operating Officer, **Iain Rayner, steps down**.
- **Standard Chartered Global Private Bank** has appointed **Deven Thacker** and **Madan Mohan** as **Relationship Managers** in the UK, and **Ashwin Rodrigues** as **Director - MENA**. Additionally, **Derek Too** has been named **Head of Wealth Planning and Family Advisory in Singapore**.
- **Step Fourth** has appointed **Sabin Lungu, Danielle Dawson, and Jack Johnston** as **Specialist UI / UX Developers**.
- **Syz Capital** has appointed **Ursula Nitschke** as **Head of Business Development and Investor Relations**. Ursula was previously Global Head of Marketing and Investor Relations at INOKS Capital SA.
- **Titan Wealth** has appointed **Giles Whittingham** as a **Business Development Director**. Giles was formerly Senior Investment Sales Manager at Legal & General Investment Management.
- **Titanbay** has promoted **Michael Gruener** from Chief Operating Officer to **Co-Chief Executive**.
- **UBP** has appointed **Antony Avinash Louis** as **Market Head of the Middle East**, from Santander Private Banking where he was Team Leader of Global NRIs and International Clients.
- **UBS** has appointed **Anders Lindegaard** as **Business Development Specialist**, **Chris Oliver** as **Head of High Net Worth** in London, and **James Meyrick** as **Head of Regions**; in addition to his role of Head of Ultra High Net Worth.
- **Vontobel** has promoted **Anton Hötzl** from Head of Structured Solutions and Treasury Europe to **Chief Operating Officer**.
- **Wealthtech Group Industrial Thought** has appointed **Mike Baker** as **Managing Director**. Mike was formerly Managing Director for FinoComp.
- **Weatherbys Private Bank** has appointed **Ellen Jeffery** as a **Private Banker** in its London Office. Ellen formerly advised ultra-high net worth clients at Barclays Private Bank. Additionally, **Hannah Law** has joined as a **Private Banker** in its Edinburgh Office. Hannah was previously a Private Banker, Professional Service Group – Vice President at Citi.
- **Wren Investment Officer** has appointed **Jo Robinson** as **Relationship Director**. Jo was formerly a Private Banker at Coutts.

*\*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.*

