

PRIVATE BANKER INTERNATIONAL

Private Banking London Awards

Thursday 7 June 2018

Awards Information Pack

Entering the Awards - Categories & Eligibility

The Private Banking Awards 2018 will recognise winners in different categories that cover the private banking sector. The awards are open to: private banks, wealth managers and solution providers. Whilst focusing mostly on UK companies and individuals, a number of categories are open to European banks and providers too.

Nominations are now open – deadline for entries is 5pm GMT on Thursday 22 March 2018.

Send your completed nominations to PBI18awards@compelo.com

Nominees should follow these simple guidelines to ensure their submission has the best chance of winning.

Submission Rules

1. Submissions can be made either on behalf of your own company or in recognition of a colleague or partner firm.
2. Maximum of 1,000 words in Word or PDF format, no appendices but pictures within the document are accepted.
3. Entry must address the award category explicitly, not generic links to web sites, corporate marketing etc.
4. Submissions should highlight the key differentiator and competitive nature of the project or implementation
5. It is made explicit the Entrant, Judges and the publication will treat any and all information in strict confidence and any quotes or information to go into the public domain will be pre-cleared by the Entrant.
6. Submissions made after the publicised cut-off date will be ignored irrespective of their relative merits.
7. The Editor and Judges reserve the right to make no award for any specific category
8. The Editor and Judges reserve the right to move a submission to a more appropriate category at their discretion
9. In submitting for more than one category the submissions must be unique (see 3)
10. The Editor and Judges' decision is final

The full list of awards categories and criteria for this year's awards can be found below.

Please note: *Whilst we recommend you to try to submit against as many of the criteria as possible, we appreciate that for some companies this may not be possible. The more you can respond against the stronger your application will be, but we would like to highlight that submitting against all criteria is not mandatory.*

Should you wish to discuss any element of the criteria or your submission in more detail, please contact Ronan McCaughey (editor, Private Banker International) on Ronan.McCaughey@verdict.co.uk

Outstanding Private Bank – UK - Domestic Clients

Celebrating the best among the private banks in the UK that are successfully serving domestic wealthy clients

Suggested performance criteria to include (where possible):

- Client assets under management
- Cost/income ratio
- Net new money
- Number of private clients
- Number of advisors/relationship managers/private bankers
- Annual staff retention rate
- Please expand on your specific business model and domestic clients acquisition as well as retention strategy in the UK
- Please expand on the other strengths that enable your institution to excel and stand out (in no more than 250 words)

Outstanding Private Bank – UK - International Clients

Celebrating the best among the private banks in the UK that are successfully serving international wealthy clients

Suggested performance criteria to include (where possible):

- Client assets under management
- Cost/income ratio
- Net new money
- Number of private clients
- Number of advisors/relationship managers/private bankers
- Annual staff retention rate
- Please expand on your specific business model and international clients acquisition as well as retention strategy in the UK
- Please expand on the other strengths that enable your institution to excel and stand out (in no more than 250 words)

Outstanding Private Bank – UK Crown dependencies

Celebrating the best among the private banks that are successfully serving wealthy clients in Jersey, Guernsey and Isle of Man

Suggested performance criteria to include (where possible):

- Client assets under management
- Cost/income ratio
- Net new money
- Number of private clients
- Number of advisors/relationship managers/private bankers
- Annual staff retention rate
- Please expand on your specific business model and client acquisition as well as retention strategy in Jersey, Guernsey and Isle of Man
- Please expand on the other strengths that enable your institution to excel and stand out in these markets (in no more than 250 words)
- How do you plan to develop your service capability for these markets in the future?

Outstanding Private Bank – Nordic region

Celebrating the best among the private banks in the Nordic region that are successfully serving wealthy clients

Suggested performance criteria to include (where possible):

- Client assets under management
- Cost/income ratio
- Net new money
- Number of private clients
- Number of advisors/relationship managers/private bankers
- Annual staff retention rate
- Please expand on your specific business model and client acquisition as well as retention strategy
- Kindly mention other strengths that enable your institution stand out in the Nordic region's private banking industry (in no more than 250 words)
- Kindly mention details if you launched any noteworthy products and/or services/ made any strategy changes in 2017 that are enabling you to excel further

Outstanding Private Bank – Western European region

Celebrating the best among the private banks in the Western European region that are successfully serving wealthy clients

Suggested performance criteria to include (where possible):

- Client assets under management
- Cost/income ratio
- Net new money
- Number of private clients
- Number of advisors/relationship managers/private bankers
- Annual staff retention rate
- Please expand on your specific business model and client acquisition as well as retention strategy
- Kindly mention other strengths that enable your institution stand out in the Western European region's private banking markets (in no more than 250 words)
- Kindly mention details if you launched any noteworthy products and/or services/ made any strategy changes in 2017 that are enabling you to excel further

Outstanding Private Bank – Eastern European region

Celebrating the best among the private banks in the Eastern European region that are successfully serving wealthy clients

Suggested performance criteria to include (where possible):

- Client assets under management
- Cost/income ratio
- Net new money
- Number of private clients
- Number of advisors/relationship managers/private bankers
- Annual staff retention rate
- Please expand on your specific business model and client acquisition as well as retention strategy
- Kindly mention other strengths that enable your institution stand out in the Eastern European region's private banking markets (in no more than 250 words)
- Kindly mention details if you launched any noteworthy products and/or services/ made any strategy changes in 2017 that are enabling you to excel further

Outstanding Private Banking Customer Relationship Service and Engagement

Celebrating a private bank with an outstanding performance record in servicing wealthy clients, customer engagement and relationship management, the use of new technologies, social media and applications

Suggested performance criteria to include (where possible):

- Number of private clients
- Percentage of new clients in past 12 months
- Number of advisors/relationship managers/private bankers
- Please expand on the initiatives your institution has taken to enable successful customer relationship service and engagement, and why you deserve this award
- Please describe the competitive environment for this proposition, referring to similar peer initiatives, and describe why this offering stands out
- How do you plan to develop the service capability in the future?

Outstanding Wealth Management Technology Provider – middle office (vendor)

Celebrating a company that is making a real contribution to the efficiency and customer-centricity of the UK and Europe wealth industry through successful middle and back-end technology offerings

Suggested performance criteria for the region to include (where possible):

- Number of clients
- Percentage of new clients in past 12 months
- Number of advisors/relationship managers/private bankers
- Please describe your institution's wealth management technology platform and why it deserves this award? When was this platform launched and how have you developed this service in 2017?
- Kindly expand on what makes this technology platform stand out from its competitors

Outstanding Wealth Management Technology Provider – back office (vendor)

Celebrating a company that is making a real contribution to the efficiency and customer-centricity of the UK and Europe wealth industry through successful middle and back-end technology offerings

Suggested performance criteria for the region to include (where possible):

- Number of clients
- Percentage of new clients in past 12 months
- Number of advisors/relationship managers/private bankers
- Please describe your institution's wealth management technology platform and why it deserves this award? When was this platform launched and how have you developed this service in 2017?
- Kindly expand on what makes this technology platform stand out from its competitors

Outstanding Front Office Digital Solutions Provider (vendor)

Celebrating a company that is making a real contribution to the efficiency and customer-centricity of the UK and Europe wealth industry through successful front-end digital offerings

Suggested performance criteria for the region to include (where possible):

- Number of clients
- Percentage of new clients in past 12 months
- Please describe the service offering you are entering and why? When was this product launched and how have you developed this service in 2017?
- Kindly expand on what makes this product stand out from its competitors
- Client recommendations/ successful case study

Outstanding Private Banking Technology Platform Offering

Celebrating a private bank that has enhanced its digital platform offering successfully to empower its relationship managers as well as enable customer-centricity, client satisfaction, and increased overall efficiency

Suggested performance criteria for the region to include (where possible):

- Number of clients
- Percentage of new clients in past 12 months
- Please describe the service offering you are entering and why? When was this product launched and how have you developed this service in 2017?
- Kindly expand on what makes this product stand out from its competitors
- How do you plan to develop the service capability in the future?

Outstanding Private Bank for Next Generation Proposition

Celebrating an institution that is extending its product proposition effectively and successfully to engage the next generation of wealthy clients

Suggested performance to include (where possible):

- Number of private clients
- Percentage of new clients in past 12 months
- Please describe the service offering you are entering and why?
- (Kindly describe the time of launch of this initiative? How have you developed this service in 2017?)
- Please describe the competitive environment for this proposition, referring to similar peer initiatives, and describe why this offering stands out
- How do you plan to develop the service capability in the future?

Outstanding Private Bank for UHNW Clients

Celebrating an institution that is extending its product proposition effectively and successfully to satisfy the needs of the ultra high net worth clientele

Suggested performance to include (where possible):

- Number of private clients
- Percentage of new clients in past 12 months
- Please describe the service offering you are entering and why?
- *(Kindly describe the time of launch of this initiative? How have you developed this service in 2017?)*
- Please describe the competitive environment for this proposition, referring to similar peer initiatives, and describe why this offering stands out
- How do you plan to develop the service capability in the future?

Outstanding Private Bank for Philanthropy Proposition

Celebrating a private bank that is making a real contribution to their clients philanthropic' lives by enabling different ways of giving and establishing best practice

Suggested performance to include (where possible):

- Number of private clients
- Percentage of new clients in past 12 months
- Number of advisors/relationship managers/private bankers
- Please describe the service offering you are entering and why?
- *(Kindly describe the time of launch of this initiative? How have you developed this service in 2017?)*
- Please describe the competitive environment for this proposition, referring to similar peer initiatives, and describe why this offering stands out
- How do you plan to develop the service capability in the future?

Most Innovative Business Model - Editor's Special Award

The following award is presented to an individual and as such these will be awarded by the judging panel without prior nomination.

To enter the awards, simply fill in the awards entry form which can be downloaded on the [Private Banker International event website](#).