

TIME TO VOTE

IN THE SPEAR'S WEALTH MANAGEMENT AWARDS



Spear's welcomes your nominations for the 2017 *Spear's* Wealth Management Awards, to be held in November at The Dorchester, London.

The Awards celebrate high net worth individuals and wealth managers for their successes, innovations and acumen in the year 1 September 2016 to 31 August 2017.

We value the opinions of readers of *Spear's* and hope you will express your views by nominating those people and companies you believe are deserving of recognition for their accomplishments. A description of each award is attached. You can nominate one person or company for each award in as many or as few categories as you would like.

Please write the category you're nominating in, the nominee and your reasons on the final page.

Feel free to elaborate your reasons on the final page or in an email or a letter.

The closing date for nominations is 14 July 2017.

Please email your submissions to awards@spearswms.com or post them to Nominations, Emily Mincer - Spear's, 40-42 Hatton Garden, London EC1N 8EB.

Nominees will be announced on spearswms.com in September.

GAGGENAU

2017 AWARDS:

- Private Banker of the Year
- Private Bank of the Year(UK)
- Private Bank of the year (International)
- Philanthropist of the Year
- Future Leader in Wealth Management
- Wealth Management Innovator of the Year
- Asset Manager of the Year (HNW)
- Asset Manager of the Year (UHNW)
- Family Office Services Provider of the Year
- Lawyer of the Year - Tax & Trust
- Lawyer of the Year - Family
- Lawyer of the Year - Reputation
- Private Client Accountant of the Year
- Property Adviser of the Year
- Trusted Adviser Award
- Outstanding Achievement Award
- Philanthropy Adviser of the Year
- Entrepreneur of the Year



PRIVATE BANKER OF THE YEAR UK

For an individual who has delivered outstanding service to private banking clients during 2016-17. The winner will also have made a significant impact on the private banking industry, and be known for providing the very best value proposition to HNWs.

PRIVATE BANK OF THE YEAR (UK) Sponsored by ENL

For a bank that has delivered outstanding service and performance for HNW individuals during 2016-17. Attention will be paid to factors including changes in client-facing head count, manager to client ratio, retention of top staff, changes in assets under management, market performance, broader services and innovation, as well as client feedback.

PRIVATE BANK OF THE YEAR (INTERNATIONAL)

For an overseas bank that has delivered outstanding service and performance for HNW individuals during 2016-17. Attention will be paid to factors including changes in client-facing head count, retention of top staff, changes in assets under management, market performance, broader services and innovation, as well as client feedback. The winner of this award will also have shown unmatched ability to service clients with cross-border needs.

PHILANTHROPIST OF THE YEAR Sponsored by

For an individual who has undertaken outstanding philanthropic activity during 2016-17. This activity may be in the form of a direct gift, the establishment of a foundation or the achievements of an ongoing foundation. The individual will be recognised for their contribution to philanthropy their vision and their innovation.

FUTURE LEADER IN WEALTH MANAGEMENT

For an individual aged under 35 in 2016-17 who has demonstrated outstanding leadership in any of the wealth management and private client industries. They will have demonstrated their potential through progression at the firm in addition to peer reference.

WEALTH MANAGEMENT INNOVATOR OF THE YEAR

For an individual or firm that has launched a product, service, solution or strategy in 2016-17 which has demonstrated true innovation in the wealth management and private client industries.

HIGH NET WORTH ASSET MANAGER OF THE YEAR

For an individual who has demonstrated outstanding returns and services to HNWs in the UK, specialising in managing investable assets between £500,000 and £15 million, in 2016-17. Attention will be paid to factors including changes in client-facing head count, changes in assets under management, market performance, broader services and innovation, as well as client feedback.

ULTRA-HIGH NET WORTH ASSET MANAGER OF THE YEAR

Includes those at Private Investment Offices. For an individual who has demonstrated outstanding returns and services to UHNWs in the UK, specialising in managing investable assets in excess of £15 million, in 2016-17. Attention will be paid to factors including changes in client-facing head count, changes in assets under management, market performance, broader services and innovation as well as client feedback.

FAMILY OFFICE SERVICES PROVIDER OF THE YEAR

For a firm that has delivered outstanding services to family offices in 2016-17. This award is for ancillary services such as wealth planning, family governance, trusts, and administration. Attention will also be paid to innovations, client feedback and quality of service.

LAWYER OF THE YEAR (TAX AND TRUST)

For the tax and trust lawyer who has provided outstanding service during 2016-17. Attention will be paid to reported cases, innovations, quality of service and client feedback.

LAWYER OF THE YEAR (FAMILY)

For the family lawyer who has provided outstanding service during 2016-17. Attention will be paid to reported cases, innovations, quality of service and client feedback.

LAWYER OF THE YEAR (DEFAMATION AND REPUTATION)

For the defamation and reputation lawyer who has provided outstanding service during 2016-17. Attention will be paid to reported cases, innovations, quality of service and client feedback. For an individual who has demonstrated outstanding service in sourcing and securing property for their clients in 2016-17.

PRIVATE CLIENT ACCOUNTANT OF THE YEAR

For the private client accountant who has provided outstanding service during 2016-17. Attention will be paid to innovations, quality of service and client feedback.

PROPERTY ADVISER OF THE YEAR Sponsored by **GAGGENAU**

For an individual who has demonstrated outstanding service in sourcing and securing property for their clients in 2016-17.

TRUSTED ADVISER AWARD

For the wealth management professional across any field who has best demonstrated in 2016-17 their indispensability and excellence to their clients beyond their normal role.

OUTSTANDING ACHIEVEMENT AWARD

For a visionary individual who has made a significant impact on the wealth management industry either as a banker, wealth manager, lawyer, accountant or in any other relevant capacity.

PHILANTHROPY ADVISER OF THE YEAR

For an individual who has undertaken outstanding support of philanthropic activity during 2016-17. This activity may be in the form of advice, the establishment of a foundation or the achievements of an ongoing foundation or programme. The individual will be recognised for their aid and advice to philanthropists, and for their innovation.

ENTREPRENEUR OF THE YEAR Sponsored by Zetta Jet

For an entrepreneur who has shown innovation and success in 2016-17.

Name of Nominated Individual/Company:

Category Nominating For:

Reason for Entering:

Three Supporting Facts/Figures:

Three Supporting Case Studies:

Name of Nominated Individual/Company:

Category Nominating For:

Reason for Entering:

Three Supporting Facts/Figures:

Three Supporting Case Studies:

Name of Nominated Individual/Company:

Category Nominating For:

Reason for Entering:

Three Supporting Facts/Figures:

Three Supporting Case Studies:

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Three Supporting Facts/Figures:

Three Supporting Case Studies: