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The Redstone Wealth Management Update

Welcome to the Redstone Search Group Wealth Management Update: Q1 2026

Noteworthy Talent Moves in EMEA

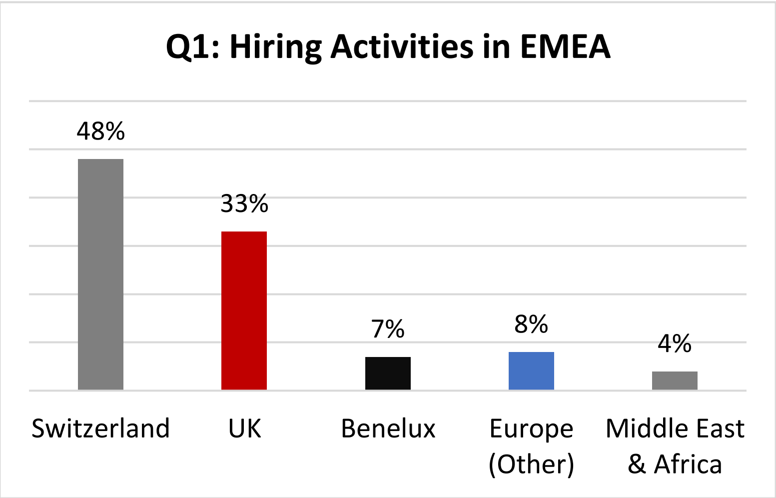
The EMEA private banking scene within Q1 2026 is one of seeing wealth fragmentation and geopolitical uncertainty reshaping client behaviour. J.P. Morgan's 2026 outlook highlights fragmentation, inflation pressure and AI as defining forces for wealth strategy, pushing private banks to reposition portfolios and advice models. Concurrently, clients are demanding more resilient, multi-jurisdictional solutions, with increased interest in cross-border booking centres, alternative assets, and defensive wealth planning. Within technology and operating model transformation, AI-powered private banking is ostensibly no longer optional: EMEA banks are moving toward autonomous, AI-enabled operating models, hyper-personalised advice, real-time insights, and automated workflows. Legacy modernisation is accelerating as institutions shift to domain-driven architectures to reduce cost-to-serve and support scalable digital wealth platforms. The client experience continues to evolve also, whilst embedded, conversational finance is becoming the norm; Clients expect seamless, omnichannel interactions, with private banks integrating advisory, execution, and lifestyle services into unified digital experiences. Programmable digital assets and tokenisation are gaining traction in wealth management, enabling fractional access to private markets and new forms of collateralisation.

Private banks are cautiously expanding digital-asset capabilities, balancing innovation with regulatory scrutiny. S&P Global notes that banks remain cautious on credit growth and are navigating rising tail risks from sovereign exposure and non-bank financial players. Regulatory pressure is intensifying, especially around suitability, cross-border advice, and digital-asset governance. Specifically, within recruitment for private banking in EMEA in Q1 2026, Banks are prioritising Relationship Manager [RM] hires with portable, multi-jurisdictional books, especially those covering UHNW families with complex cross-border needs. There's a clear shift away from volume hiring toward fewer, higher-impact bankers who can deliver immediate revenue uplift. Switzerland and the Middle East Remain the talent gravity centres; Zurich, Geneva, Dubai, and Abu Dhabi continue to dominate hiring, driven by asset inflows and regulatory stability. London hiring is more selective, focused on international desks (MENA, South Asia, LatAm) rather than domestic coverage. Thirdly, private banks are recruiting AI-literate bankers, product specialists, and digital-wealth leads who can integrate automated insights into client advisory; New hybrid roles ["Augmented RMs"] are appearing, blending traditional coverage with data-driven portfolio steering. Looking forward into the rest of 2026, geopolitical and macro uncertainty will continue to push UHNW clients toward multi-jurisdictional diversification, safer booking centres and more conservative leverage. Switzerland and the Gulf remain the primary beneficiaries of asset inflows, while EU centres face slower momentum. Supervisors across EMEA are sharpening scrutiny on remote advice, suitability, and digital-channel interactions. Banks will spend the rest of 2026 strengthening compliance architecture and reducing exposure to high-risk cross-border models.

Fahd Iqbal – most recently CIO Middle East with UBS – has been appointed to the position of Head of Investment Services with UBP - Union Bancaire Privée in Dubai, United Arab Emirates. Iqbal spent just under two years in his former role with UBS – he'd originally spent just under twelve years with Credit Suisse – first joining the firm Q1 2013 in the role of Head of Middle East Research from EFG Hermes where he'd held the role of Director, MENA Strategy from Q3 2006. **Mark Pierce** – most recently Private Banker [International Team] with Arbuthnot Latham

& Co., Ltd – has been appointed to the position of Senior Private Banker with Hassium Asset Management LLP in London. Pierce spent just under three years with Arbuthnot Latham & Co., Ltd – joining Q3 2022 from Coutts where he'd held the role of Private Banker [Coutts Campbell's Office] for just under five-and-a-half years from Q2 2017. LGT Private Banking has appointed **Edgard Vilela** – most recently Head of Commercial Team [Zurich] with Itaú Private Bank – to the position of Managing Director, Senior Relationship Manager in Zurich, Switzerland. Vilela re-joined Itaú Private Bank Q3 2021 as Senior Vice President Institutional Desk from Indosuez Wealth Management where he'd held the role of Director, Private Bank for one-and-a-half years – joining Q1 2020 from his original stint with Itaú Private Bank. Secondly, **Daniel Narath** – most recently Relationship Manager with Edmond de Rothschild – has been appointed to the position of Managing Director with LGT Private Banking in Zurich, Switzerland. Narath spent just over one year with Edmond de Rothschild – joining Q4 2024 from UBS where he'd held the role of Executive Director for just under one-and-a-half years – he'd first joined Credit Suisse Q4 2017.

Alessandro Cortese – most recently Private Banker with PICTET Group – has been appointed to the position of Director, Private Banker with J. Safra Sarasin in Monaco. Cortese spent just under seven-and-a-half years with PICTET Group – holding his most recent role from Q1 2023. Secondly, **Edoardo Romano** – most recently Private Banker with PICTET Wealth Management – has been appointed to the position of Senior Private Banker with J. Safra Sarasin – he relocates from Monaco to Munich, Germany for the role. Romano spent just over six years with PICTET Wealth Management – joining Q1 2020 from Barclays Wealth Management where he'd worked for just under five years – holding the role of Private Banker from Q4 2019. Bank Degroof Petercam veteran **Amaury Steyaert** has joined Mercier Van Lanschot in the role of Private Banker. Steyaert spent twenty-four years with Bank Degroof Petercam – most holding a Team Advisory role from Q4 2015. Vontobel has appointed **Christos Mitropapas** – most recently Investment Counselor UHNW with Citi in Madrid, Spain – to the position of Executive Director, Private Banker in Zurich, Switzerland. Mitropapas spent just over three-and-a-half years with Citi – he'd formerly held the role of Financial Advisor, Senior Asset Manager with Mental Capital for over eight years from mid-2012. Deutsche Bank has hired Senior Relationship Manager **Konstantinos Vasileiadis** of Syz Group in Geneva, Switzerland. Vasileiadis joined Syz Group mid-2025 from HSBC where he'd held the role of Senior Relationship Manager for just under three years from Q3 2022 – prior to this he'd worked for Credit Suisse for over fourteen years – holding the role of Director from Q1 2018. Secondly, Deutsche Bank has appointed **Muhammad Salahuddin** – most recently Senior Relationship Manager Middle East with Julius Baer – to the position of Senior RM – UHNWI & Institutional Coverage GCC. Salahuddin spent just under two-and-a-half years with Julius Baer – joining Q3 2023 from Credit Suisse where he'd worked for just under five years focusing on UHNWI & Institutional Coverage Middle East from Q3 2018.



Oliver Patterson – most recently Region Head for UK Private Wealth Management with Goldman Sachs – has been appointed to the position of Managing Director, UK Team Leader with Deutsche Bank in London. Patterson spent twenty-two-and-a-half years with Goldman Sachs – holding his most recent role from Q2 2021. **Aydın Burak Gül** – most recently Executive Director, Wealth Management with J. Safra Sarasin – has been appointed to the position of Executive Director, Global Families & Institutional Wealth with UBS in Zurich, Switzerland. Burak Gül spent three years with J. Safra Sarasin – joining Q1 2023 from Credit Suisse where he'd held the role of Director, Wealth Management for six years – joining Q1 2017 from TEB. **Simon Durrant** – most recently Senior Client Director with Coutts – has been appointed to the position of Partner with ARBION Private Investment Office in London. Durrant spent just under five years with Coutts – holding the role of Head of Thames Valley Wealth Management from Q1 2025 until Q4 2025 – he'd formerly spent just under five-and-a-half years with Santander Private Banking – holding the role of Senior Private Banker, Private Wealth UHNW from Q3 2019 – he first joined the firm Q1 2016 from HSBC.

Sebastian Marwood – most recently Director, WAM Business Strategy & Technology Lead [Capital Markets] with Accenture – has been appointed to the position of Head of Wealth Management & Private Banking UK & I with CAPCO in London. Marwood spent four years with Accenture – joining Q1 2022 from AVANADE where he'd held the role of Director, UKI Capital Markets Industry Lead for just under three years – prior to this he'd held the role of Senior Manager, Wealth & Asset Management with KPMG for just under six years from mid-2016. **Matthew Roberts** – most recently Senior Private Banker with UBP - Union Bancaire Privée – has been appointed to the position of Portfolio Director with Cazenove Capital in London. Roberts spent just under one year with UBP - Union Bancaire Privée – he'd previously held the same role with SG Kleinwort Hambros from mid-2023 – joining from Barclays Wealth Management where he'd held the role of Vice President, Wealth Manager for five-and-one-quarter years from Q2 2018. **Devon Liew** – most recently Personal Wealth Banking Team Head with UOB – has been appointed to the position of Private Banking Relationship Manager with Mashreq in Dubai, United Arab Emirates. Liew spent just over three-and-a-half years with UOB – first joining mid-2022 from Standard Chartered Bank where she'd held the role of Relationship Manager for just over three years from mid-2019.

Pritash Mathur – most recently Managing Director, Head Family Office Coverage Global India/Global South Asia with HSBC in Singapore – has been appointed to the position of Private Banking Head of International Coverage with Barclays Private Bank in Dubai, United Arab Emirates. Mathur spent just over seven-and-a-half years with HSBC – first joining mid-2018 from Deutsche Bank where he'd worked for just under five years – holding the role of Global Head Asset Management & Wealth Management Centers from Q2 2016. **Vital Postlethwaite** – most recently Team Coach Priority Banker, Entrepreneurs & Liberal Professions with BNP Paribas Fortis – has been appointed to the position of Private Banker with DELEN Private Bank. Postlethwaite spent just under ten years with BNP Paribas Fortis – holding his most recent role from Q1 2023. **Sophie Barrington** – most recently Wealth Manager with Barclays – has been appointed to the position of Private Banker with JP Morgan Private Bank in London. Barrington spent just over three-and-a-half years with Barclays – joining Q3 2022 from Coutts where she'd worked for three years – holding the role of Senior Associate Wealth Manager [Sports, Media & Entertainment] from Q1 2021. **David Doyle** – most recently Private Banking Executive with Arbuthnot Latham – has been appointed to a similar position with Weatherbys Private Bank in London. Doyle joined Arbuthnot Latham Q3 2025 from Investec where he'd worked for just under seven years – holding the role of Private Banker from Q3 2019. **Tommaso Faina** – most recently Ambassador, Senior Private Banker with Fineco Bank – has been appointed to the position of Wealth Advisor, Partner with Banca Generali. Faina spent seven-and-a-half years with Fineco Bank – holding the role of Senior Private Banker from Q1 2022.

Sophie Whitehead – most recently Personal Banker with NatWest Group – has been appointed to the position of Private Banking Manager with Handelsbanken. Whitehead spent just under two years with NatWest Group. UBP - Union Bancaire Privée has appointed **Joseph Hallmark** – Director of Operations with Folio Partners – to the position of Account Manager Private Banking in London. Hallmark joined Folio Partners Q2 2024 – prior to this he'd held the position of Senior Account Director with THG Ingenuity from Q4 2022. **Kouroche Achtari** – most recently Market Head, UHNW Desk Head Swiss International with HSBC – has been appointed to the position of Head of Private Banking Suisse Romande with Deutsche Bank in Geneva, Switzerland. Achtari spent just over two years with HSBC – joining Q4 2023 from Credit Suisse where he'd worked for just under eight years – holding the role of Regional Head of Premium Clients for French Speaking Regions in Switzerland from Q2 2021. Barclays Switzerland is understood to have made two senior appointments; **Victoria Nahmany** – most recently Head of Wealth Planning Europe with PICTET Wealth Management – to the position of Director, Head of Wealth Advisory. Nahmany spent just over ten-and-a-half years with PICTET Wealth Management – first joining mid-2015 as UK Wealth Planner/Head of Wealth Planning UK from Rhone Trust & Fiduciary Services where she'd held the role of Wealth Planner from Q1 2011. Secondly, **Eljan Ahmadov** has also joined Barclays within its investment advisory practice – reportedly to support Oliver Dufek, the Head of Investment Advisory. Ahmadov most recently held the role of Vice President, Investment Specialist with PICTET Wealth Management – first joining the firm Q4 2015 from LYXOR Asset Management.

Erik von Bonsdorff – most recently Relationship Manager with UBS – has been appointed to the position of Partner for Private Client Bank AG in Zurich, Switzerland. Von Bonsdorff first joined Credit Suisse Q4 2013 as Senior Relationship Manager, Director of Nordic Team from Morgan Stanley where he'd worked for just over twelve years – holding the role of Vice President from Q1 2002. Unigestion's UWealth has appointed **Cèdric de Serigny** – former Investor Relations Vice President with ACE & Company – to the position of its new Chief Operating Officer [COO] in Geneva, Switzerland. De Serigny spent one year with ACE & Company – joining Q1 2023 from TALLARD Management Ltd where he'd held the role of Family Officer for just under three years from Q2 2020 – prior to this he'd held the role of Director of AUM Asset Management for just over eight years from Q1 2015. It is understood that de Serigny succeeds Antoine David, who joined Unigestion in 2019. **Sandro Tiziani** – most recently Head of Sales Switzerland with Bellevue Asset Management – has been appointed to the position of Director, Investor Relations for Switzerland & Italy with Fermat Capital Management LLC in Zurich, Switzerland. Tiziani spent just over ten years with Bellevue Asset Management – joining Q4 2015 in a senior sales role from Bank J. Safra Sarasin Ltd where he'd held the role of Product Sales & Investment Advisor for just under two years from Q4 2013 – prior to this he'd worked for Julius Baer for six-and-a-half years in the role of Fund Specialist. **Kevin Vonwil** – most recently Senior Client Relationship Manager, Private Banking/Key Clients with Luzerner Kantonalbank AG – has been appointed to the position of Head of Investor Relations Switzerland & Liechtenstein with NIVALION AG. Vonwil spent just over one year with Luzerner Kantonalbank AG – joining Q4 2023 from Partners Group where he'd worked for thirteen-and-one-quarter years – holding the role of Senior Client Relationship Manager, Senior Vice President for two years from Q1 2022.

Janic Frölicher – most recently Founding Partner with BackBone Ventures – has been appointed to the position of Senior Banker with NOVUM Partners. Frölicher spent just under seven-and-a-half years with BackBone Ventures – joining Q1 2018 from Aquilas Company Builder AG where he'd held the role of Investment Associate for just over one year – joining Q3 2017 from Credit Suisse where he'd held the role of Compliance and Regulatory Affairs Officer, Global PEP Desk for one-and-a-half years from Q2 2016. **Paolo Bortolín** has been appointed to the position of Director, Business Development [SRM] Private Banking with BIL Suisse in Lugano, Switzerland – he joins from his most recent role as Deputy Chief Financial Officer of the City of Lugano where he played a central role in the strategic positioning of the Ticino city as a blockchain and crypto hub. Bortolín spent just under five years with City of Lugano – joining Q1 2021 – he'd formerly held the role of Head Distribution Retail Banking – Southern Switzerland with PostFinance SA for just under two years from Q2 2019. **Richard Märki** – most recently Senior Investment Advisor with Consilior AG – has been named as Managing Partner of new outfit Granat Vermögensverwaltungs AG in Basel, Switzerland. Märki spent just over three-and-a-half years with Consilior AG – joining mid-2022 from Credit Suisse where he'd worked for just under sixteen years – holding the role of Senior Relationship Manager from Q2 2018. Secondly, **Niklaus Arnosti** has been named as Chair of the Board of Directors, focusing on the strategic direction of the company.

It is reported that Oddo BHF has announced the addition of **Simone Westerfeld** – COO Group Integration Office with UBS – to its team as deputy CEO, effective June 1st 2026. Westerfield is responsible for developing a growth plan based on new technology and a refreshed structure organised by client type rather than field of expertise – she'd first joined UBS as Head of Multinationals & Strategic Transactions Q3 2019 – she'd held her most recent role from Q3 2024. It is understood that **Fiona O'Neill** – most recently Head of Global Equity Capabilities with Fidelity International has been appointed to the position of Investment Head at Sarasin & Partners. O'Neill spent over twenty years with Fidelity International – holding her most recent role from Q2 2024. It is reported that LeoVest has added two experienced Client Advisors to serve clients in the Netherlands and Belgium; **Ruud Flipse** – Partner with SWISSPARTNERS – plus **Tom de Bruijn** – Senior Manager with Deloitte – reportedly joined the outfit at the start of January. Flipse joined SWISSPARTNERS Q4 2011 from Van Lanschot Bankiers Belgium where he'd held the role of Managing Director for thirteen years. De Bruijn joined Deloitte Q1 2023 – his expertise comprises structured solutions and financing within international banks and consulting firms. It is reported that SMZH has appointed former LLB Executive **Martin Kaindl** as its new Chief Risk Officer & Chief Financial Officer. In addition, **Felicitas Morhart** and **Yannis Skiadas** have strengthened the board of directors [subject to Finma approval.] Deputy CEO Peter Siber departed SMZH in January and has taken a role at Raiffeisen Thalwil as Head of Services and Member of Bank Management – he previously held management roles with VP Bank and Julius Baer. In addition, **Alexandre Stumm** has reportedly also joined Raiffeisen Thalwil as Head of Sales and Private Client Advisory. It is reported that Lombard Odier has added four members to the equity partnership in 2026; **Samy Chaar**, **Fabrice Rossi**, **Stéphane Herrmann** and **Julien Desmeules**. Chaar is the Chief Investment Officer for Switzerland and Chief Economist, while Rossi serves as Senior Private Banker.

It is reported that **Steen Krage** – Relationship Manager with UBS – has joined Deutsche Bank Private Bank's Zurich branch with responsibility for building out the wealth management business in Denmark. At Deutsche Bank, he will report to James Whittaker, Head of UK and Nordics for the private banking unit. **Anne–Laurence Roucher** – most recently Head of Private Equity & Natural Capital with Mirova – has been appointed to the position of Group Head of Private Assets with Edmond de Rothschild Asset Management. Roucher spent just over thirteen-and-a-half years with Mirova – holding her most recent role from Q4 2021. **Reto Frei** – formerly Senior Relationship Manager UHNWI with Credit Suisse – has been appointed to the position of Senior Partner with Helvetic Trust. Frei spent two years with Credit Suisse – joining Q3 2016 from UBS – holding the role of Client Advisor WM Global Family Office [GFO] from Q1 2013. Frei most recently held the role of Chief Financial Officer with SAYANO Family

Office AG for seven-and-a-half years from Q3 2018. **Christopher Huwyler** – most recently Relationship Manager, Private Banking Key Clients HNWI with Zürcher Kantonalbank – has been appointed to the position of Senior Relationship Manager with Vontobel in Zurich, Switzerland. Huwyler spent over thirty years with Zürcher Kantonalbank – holding his most recent role from Q4 2021. Secondly, **Sebastian Luck** – most recently Client Account Manager UHNW Switzerland with UBS – has been appointed to the position of Vontobel. Luck spent five years with UBS – joining Q1 2021 from Zürcher Kantonalbank where he'd worked for just under nine-and-a-half years – holding the role of Business Partner, Key Clients UHNW Switzerland from Q1 2017.

Anji Kang-Stewart – most recently Managing Director, Global Head of Marketing with MAN Group – has been appointed to the position of Managing Director, Chief Marketing Officer with Barclays Private Bank in London. Kang-Stewart spent just over five years with MAN Group – joining Q4 2020 from Wellington Management where she'd held the role of Managing Director, Head of EMEA & Global Wealth Marketing from Q4 2014. **Ueli Moser** – most recently Head of Private Banking Rheinfelden with Aargauische Kantonalbank – has been appointed to the position of Asset Manager with Aquila & Partners AG in Basel, Switzerland. Moser spent just over sixteen years with Aargauische Kantonalbank – holding his most recent role from Q1 2018. **Lisa Parkes** – most recently Private Banker within the Corporates and Entrepreneurs Team within Investec – has been appointed to the position of Private Banking Director with Metro Bank UK in London. Parkes spent just over eleven years with Investec – holding her most recent role from Q1 2018. **Jody Tebbutt** – most recently Senior Relationship Manager with NatWest Group – has been appointed to the position of Associate Director, Business Development with Coutts in London. Tebbutt spent just under eight-and-a-half years with NatWest Group – holding the most recent role from Q3 2022. **Nick Helyar** – most recently Private Banker with Santander UK – has been appointed to the position of Wealth Planner with Kingswood Group in London. Helyar spent just under twenty-seven years with Santander UK.

Trevor Isherwod – most recently Global Head of Marketing [Global Private Bank] with HSBC – has been appointed to the position of Chief Marketing Officer, International Private Bank with JP Morgan Private Bank. Isherwood spent three years with HSBC – joining Q1 2023 from Titanbay where he'd held the role of Global Head of Marketing from Q4 2021 – prior to this he'd held the role of Head of Digital & Content Marketing with Fidelity International for just over four years from Q4 2017. **James Hadsley** – most recently Private Banker with Coutts – has been appointed to the position of Senior Private Banker with Arbuthnot Latham in London. Hadsley spent fifteen years with Coutts – holding his most recent role from Q4 2016. **Matthew Holmes** – most recently Executive Director with Coutts – has been appointed to the position of Director with Barclays Private Bank. Holmes spent just over fifteen-and-a-half years with Coutts – holding the role of Head of Wealth Management, Thames Valley from Q1 2016 until Q3 2017. **Will Vaughan** – former Client Advisor with Brown Shipley – has been appointed to the position of Private Banker with Revolut. Vaughan re-joined Brown Shipley Q1 2021 – subsequently joining Verso Investment Management LLP where he'd most recently held the role of Client Director from Q1 2024. **Simone Bergantino** – most recently Client Account Manager, Wealth Management with UBS – has joined JP Morgan in Milan, Italy. Bergantino spent just under three years with UBS from Q4 2022. **Sean Evans** – most recently Director with Barclays Private Bank – has been appointed to the position of Senior Private Banker with PICTET Wealth Management. Evans first joined Barclays Q3 2018 as Private Banker from Brown Shipley where he'd held the role of Senior Client Manager for five years from Q4 2013.

Gitanjali Sharma Mathur – most recently Director, Team Head, Private Bank and Wealth Management with Barclays – has been appointed to the position of Director with Deutsche Bank Wealth Management in London. Sharma Mathur spent two years with Barclays – joining Q2 2023 from HSBC where she'd held the role of Director, Private Banking for just over ten years – joining Q1 2013 from Bank of America Merrill Lynch where she'd held the role of Vice President and Financial Advisor for five-and-one-quarter years from Q4 2006. **Thomas Smart** – most recently Senior Private Banker with Arbuthnot Latham & Co., Ltd – has been appointed to the position of Associate Director, Financial Planning with Evelyn Partners. Smart spent just over five-and-a-half years with Arbuthnot Latham & Co., Ltd – joining mid-2020 from Coutts where he'd held the role of Wealth Manager for just under four-and-a-half years – joining Q1 2016 from RBS where he'd held the role of Financial Planning Manager for thirteen-and-three-quarter years from Q3 2006. **Rob Salisbury** – most recently Director, Head of Exeter Office with Arbuthnot Latham & Co., Ltd – has been named as Director of Salisbury Partners Ltd. Salisbury spent nine-and-a-half years with Arbuthnot Latham & Co., Ltd – joining Q3 2016 from Coutts where he'd held the role of Director, Private Banker & Head of Exeter Office for four years – joining Q3 2012 from RBS where he'd held the role of Relationship Director, Corporate & Institutional Banking from Q1 2010. **Jamie Lang** – most recently Investment Manager, Portfolio Management with Canaccord Genuity Wealth Management – has been appointed to the position of Investment Advisor with Barclays. Lang spent just over two-and-a-half years with Canaccord Genuity Wealth Management – joining Q3 2023 from Nedbank Private Wealth International where he'd held the role of Private

Banker from Q1 2021. **Tarryn Fulton** – most recently Senior Private Banker with Coutts – has been appointed to the position of Private Banking Manager with Handelsbanken. Fulton spent just under six-and-a-half years with Coutts – joining Q1 2019 from NatWest where she'd held the role of Private Banker for just over nine-and-a-half years from Q4 2008.

Samuel Dawes – most recently Managing Director, Channel Islands with FNZ Group – has been appointed to the position of Client Relationship Officer with EFG Private Bank. Dawes spent just over two-and-a-half years with FNZ Group – joining Q3 2023 from Santander Financial Services where he'd held the role of Relationship Director, Financial Intermediaries for just over eight years from mid-2015 – he'd held the role of Private Banker with Santander Private Banking from Q1 2013. **Charlotte Schiltz** – most recently Private Banker with KBC Bank & Verzekering – has been appointed to the position of Private Banker with Mercier Van Lanschot. Schiltz formerly held the role of Senior Wealth Manager with BELFIUS for two-and-three-quarter years – joining Q4 2022 from ING where she'd held the role of Senior Private Banker from Q4 2017. **Ken Geeraers** – most recently Advisory Asset Manager with DIERICKX LEYS Private Bank – has been appointed to the position of Private Banker with DELEN Private Bank. Geeraers spent over nineteen years with DIERICKX LEYS Private Bank – joining Q3 2006 from DEXIA. **Kaie-Liis Asu** – most recently Head of Private Banking with LHV in Tallinn, Estonia – has been appointed to the position of Head of Baltics with Rothschild & Co. in Zurich, Switzerland. Asu spent four-and-one-quarter years with LHV – holding her most recent role from Q4 2023. **Bavo Van der borght** – most recently Certified Private Banker with ABN AMRO – has been appointed to a similar position with Degroof Petercam. Van der borght spent seven years with ABN AMRO – holding his most recent role from Q4 2021. **Natalia Mustjõgi** – most recently Private Banker with SEB in Tallinn, Estonia – has been appointed to the position of Relationship Manager, Director with J. Safra Sarasin – she relocates to Zurich, Switzerland for the role. Mustjõgi spent just under thirteen years with SEB – joining Q2 2013 from AS Swedbank.

Noteworthy Talent Moves in Asia

APAC private banking continues to expand at pace in 2026, supported by rising regional wealth and deepening capital markets. The Asia-Pacific private-banking market is projected to grow at a 9.43% CAGR from this year to 2031, underscoring the region's long-term structural tailwinds. APAC remains highly fragmented, with regulatory, cultural, and market differences shaping client needs. Private credit and real-asset markets illustrate this fragmentation, with lenders and investors navigating divergent banking regimes and underwriting conditions across the region. UHNW and family-office clients are increasing allocations to private credit, real assets, and income-oriented strategies, driven by demand for yield, diversification, and inflation protection. APAC real-asset outlooks highlight a barbell approach: defensive income strategies paired with selective exposure to secular-growth sectors like data centres and logistics. Digital transformation continues to accelerate within the region; Banks across APAC are intensifying investment in automation, AI, and digital advisory, reflecting broader regional banking trends. Industry leaders emphasise that generative AI, automation, and digital-first operating models are becoming central to competitiveness in the region. The retrenchment of traditional lenders and the rise of private credit are influencing wealth-management conversations; UHNW clients increasingly seek bespoke financing, structured solutions, and alternative credit, reflecting the region's evolving corporate-financing landscape. There continues to be intensifying competition for talent within the region – with growth concentrated in hubs like Singapore, Hong Kong, and Sydney, banks are competing for senior RMs with cross-border expertise, digital fluency, and strong UHNW networks. Talent flows are increasingly shaped by regulatory stability, platform sophistication, and product breadth. With regards to the talent overview in 2026, Singapore continues to dominate hiring, fuelled by regulatory stability, strong inflows, and its role as the preferred booking centre for North Asia and Southeast Asia wealth.

Banks are shifting senior RM headcount toward Singapore even when clients are elsewhere, reflecting the region's ongoing "hub-over-spoke" consolidation. Family offices - especially in Singapore - are poaching senior bankers for CIO, investment, and capital-markets roles. Conversely, private banks are hiring from asset managers to strengthen alternatives and discretionary-portfolio capabilities. Hong Kong is seeing a cautious rebound in recruitment, but banks are prioritising China-connected UHNW coverage, structured-product specialists, and cross-border-savvy RMs. Hiring remains heavily skewed toward bankers with deep mainland networks and proven book portability. Looking forward into the rest of 2026, Singapore will likely strengthen its position as the region's dominant hub whilst Hong Kong will likely see a recovery [gradual but directionally positive.] Singapore will continue to attract the lion's share of UHNW inflows, driven by regulatory stability, geopolitical neutrality, and its expanding ecosystem of family offices. Expect further consolidation of teams, booking centres, and leadership roles into Singapore as banks double down on scale and efficiency. Hong Kong will see a slow but steady improvement in sentiment, with hiring and client activity focused on Greater China connectivity, structured solutions, and capital-markets-linked advisory; The city's competitiveness will hinge on regulatory clarity and the pace of mainland economic stabilisation.

Dong Chen – most recently Chief Asia Strategist & Head of Asia Research with PICTET Wealth Management – has been appointed to the position of Chief Investment Officer, Asia with J. Safra Sarasin in Hong Kong. Chen spent nine-and-three-quarter years with PICTET Wealth Management – first joining the firm mid-2016 from JP Morgan where he'd held the role of China Economist from Q3 2011. **Werner Schlossmacher** – most recently GWM Channel & Digital Sales Lead; Head Operating Office Digitalization with UBS in Zurich, Switzerland – has been appointed to the position of COO Asia PBWM with Barclays Private Bank in Singapore. Schlossmacher spent just over two years in his former role with UBS from Q1 2024 – he'd first joined Credit Suisse Q4 2009 as Head of Structured Derivatives APAC, Investment Solutions South East Asia. **Jas Eng** – most recently Director, Premier Elite [North Asia] with HSBC – has been appointed to the position of Director, North Asia [Private Bank] with DBS Bank in Singapore. Eng spent just over four-and-a-half years with HSBC – joining Q2 2021 from Standard Chartered Bank where she'd held the role of Associate Director, North Asia Private Bank for three-and-one-quarter years – prior to this she'd held the role of Senior Client Advisor, VP Onshore Private Bank with United Overseas Bank Limited [UOB] for just under three years from Q2 2015.

It is understood that HSBC has appointed **Valentín Valderrábano** to the position of Chief Commercial Officer, International Wealth & Premier Banking [IWPB], effective from February 21st. In the role, he focuses on strategy execution for IWPB, driving wealth-led growth, enhancing customer experience, and strengthening the integration of digital and physical channels. He relocates from New York to Hong Kong and reports to IWPB CEO Barry O'Byrne. Valderrábano has more than twenty years of experience in retail banking and wealth management, most recently holding the role of CEO of Global Wealth at Citibank – he'd spent over twenty-two years with the firm – holding his most recent role from Q3 2022. Citi Private Bank has appointed **Tarang Garde** – Managing Director with BNP Paribas Wealth Management – to the position of Managing Director in Singapore. Garde joined BNP Paribas Wealth Management Q4 2021 from Credit Suisse which he re-joined Q3 2015 in the role of Executive Director – prior to this he'd held the role of Director with Coutts for just over two years from Q3 2013. **Inka Kristie Yohanda** – most recently Vice President, Investment Advisory with Deutsche Bank – has been appointed to the position of Director, Investment Advisory with Julius Baer in Singapore. Kristie Yohanda spent four-and-three-quarter years with Deutsche Bank – joining Q2 2021 from Citi where she'd worked for seven-and-three-quarter years – holding the role of Vice President, FX Sales & Advisory from Q1 2016. **Arthur Fong** – former Chief Executive Officer with One Heritage Capital Management Singapore – has been appointed to the position of Managing Director, Senior Advisor with Wisdom Family Office. Fong spent one-and-a-half years with One Heritage Capital Management Singapore – joining Q3 2022 from Schroders where he'd held the role of Managing Director from Q3 2017. Fong subsequently joined Paragon Capital Management Q1 2024 as Chief Executive Officer.

Pradinan Arkarachinores – most recently Managing Director with BNP Paribas – has been appointed to the position of Managing Director with Raffles Family Office in Singapore. Arkarachinores spent just over three-and-a-half years with BNP Paribas – joining mid-2022 from Morgan Stanley where she'd held the role of Executive Director – prior to this she'd held the role of Executive Director with Julius Baer for two-and-a-half years from Q3 2016 – in her new role she is tasked with leading and managing a team that oversees portfolios that serve UHNW Asian families with a focus on relationship management, strategic advisory and the delivery of comprehensive wealth solutions. In the role, she reports to Singapore CEO Kendrick Lee. **Stephen Yeung** – most recently Executive Director, Investment Consulting with UBS – has been appointed to the position of Director, Investment Manager with Deutsche Bank. Yeung first joined Credit Suisse Q3 2015 from UBS where he'd first held the role of Associate

Director, Product & Regulatory Management/Structured Product for two years from Q4 2013 – joining from Citi where he'd held the role of Head of Structured Product [Consumer Bank] Hong Kong from Q4 2009. It is reported that Bank of Singapore has appointed **Collins Chin** to the position of Global Chief Financial Officer. It is understood he will also become a member of the bank's global management committee. In the role, he reports to CEO Jason Moo. Chin most recently held the position of Head of Investor Relations for OCBC, the parent company of Bank of Singapore. Prior to joining the firm in 2009, he'd held regional leadership roles with Royal Bank of Scotland, Standard Chartered Bank and Barclays Capital across the finance, capital markets and risk functions.

It is reported that HSBC Private Bank has appointed **Phaneendar Bhavaraju** and **Rangan Krishnan** as Senior Relationship Managers within the global India team. In the role, they both report to Manoj Ramarao, Senior Desk Head, Global India, Singapore and Hong Kong. Bhavaraju has over twenty-eight years of experience across FX, rates, derivatives, precious metals, private banking and structured finance. Over the past nine years, he served as Chief Investment Officer at external asset managers in DIFC, including Jupiter Wealth Advisors and Arrow Capital, and led multi-family office investment activities for O3 Capital India. Prior to this, he spent nine years in private banking roles at RBS plus Credit Suisse. Krishnan has more than thirty-one years of wealth management experience, most recently with Bank of Singapore, where he spent nine years in the role of Team Head managing Ultra-High Net Worth clients, family offices and institutional portfolios. Prior to this, he worked for ANZ, Credit Suisse, ABN AMRO Bank plus DSP BlackRock Mutual Fund. Thirdly in Thailand, **William Fok** has reportedly been appointed to the position of Country Head of Private Bank for HSBC Private Banking. Based in Bangkok, he reports to Benjamin Wang, Desk Head for Thailand & Vietnam. Fok has over twenty years of experience in structured products and investment advisory – he most recently served as Senior Investment Counsellor for LGT.

Farro Capital has appointed **Priyaka Dhingra** to the position of Head of Impact & Sustainable Finance. In the role, she will lead the mobilization of capital from family offices toward high-impact climate change mitigation, adaptation of cutting-edge technologies and social development priorities across Southeast and South Asia, leveraging blended-finance structures alongside philanthropic capital. Dhingra has extensive experience across sustainable finance, blended-finance structuring, impact investing, and philanthropy in Asia, having previously worked at family offices, institutional platforms and multilateral initiatives. She most recently worked for United Nations-supported Principles for Responsible Investment [UNPRI], leading environmental stewardship initiatives with asset owners and managers across Asia Pacific. Prior to this she'd held the role of Director, Climate Change & Sustainability [Sustainable Finance] with EY for one-and-a-half years from Q3 2023. **Puneet Matta** – most recently Head of Global Wealth Management, India with UBS – has been appointed to the position of Co-Founder, Vice Chairman with Neo Wealth and Asset Management in Mumbai, India. Matta spent just over two-and-a-half years with UBS – he'd first joined Credit Suisse mid-2020 from UBP - Union Bancaire Privée where he'd held the role of Managing Director, Market Manager, NRI for seven-and-three-quarter years from Q4 2012 in Singapore.

It is reported that Bank of Singapore has appointed **Eng Chien Chan** – Managing Director, Market Head Taiwan & Co Head Offshore China with HSBC – to the position of Market Group Head for Greater China, effective March 17th. Based in Singapore, he will report to Rickie Chan, Greater China Head of Private Banking and Hong Kong branch Chief Executive. Chien Chan joined HSBC Q2 2019 from Credit Suisse where he'd held the role of MD, Head of Cross-Aset Solutions & Head of Macro Sales APAC for just over seven-and-a-half years from Q3 2011 – prior to this he'd held the role of Managing Director, Asia ex Japan Head of Corporates & Risk Solutions Group with NOMURA from mid-2010. **Carl Ashton** – most recently Head of Investment Associate Development Programme [South Asia] with Citi Private Bank – has been appointed to the position of Executive Director, Client Advisor – Australia Offshore with UBS Global Wealth Management. Ashton first joined Citi Q3 2006 – he'd held his most recent role from mid-2021. It is reported that Standard Chartered Global Private Bank has appointed **Hu Hong** to the position of Group Market Head, focused on building and growing a new Greater China team in Singapore. In the role, he reports to Foo Tian Ong, Regional Head, Southeast Asia and Singapore Location Head, Standard Chartered Global Private Bank. Hu is a seasoned private banking veteran with experience covering the Greater China markets. He most recently worked for Bank of Singapore, where he managed three Market Heads and a team of 100 frontline staff. **Andy Yuen** – most recently Managing Director SA with Julius Baer – has been appointed to the position of COO of Blackhorn Wealth Management in Hong Kong. Yuen spent one year with Julius Baer – joining 2024 from UBS Wealth Management where he'd held the role of Managing Director for ten years from 2014 – prior to this he'd held the role of Executive Director with Goldman Sachs for nine years from 2005.

Westpac has hired Private Banking Executive **Michael Armanu** – most recently with Commonwealth Bank in Canberra, Australia. Armanu spent one year with Commonwealth Bank – joining Q1 2025 from NAB where he'd worked for just over two-and-a-half years – holding the role of Senior Business Banking Manager from Q4 2023. **Khadijah Kamarozaman** – most recently VP, Private Bank Marketing with UOB – has been appointed to the position of Associate Director, Private Bank Marketing with Standard Chartered in Singapore. Kamarozaman spent just over three years with UOB – first joining the firm Q1 2023 from Citi where she'd worked for just under six-and-a-half years – holding the role of Events & Content Marketing Manager from Q4 2021. **Rosalind Li** – most recently Vice President, Global Private Banking with HSBC – has been appointed to the position of Associate Director with UBS in Hong Kong. Li spent just over two-and-a-half years with HSBC – joining mid-2023 from DBS Bank where she'd held the role of Associate for just under four years – joining Q3 2019 from Standard Chartered Bank. **Xu Longxiang** – most recently Senior Client Advisor, Private Wealth North Asia with UOB – has been appointed to the position of Director, Private Banking Greater China with DBS Bank in Singapore. Longxiang spent just over three-and-a-half years with UOB – joining Q2 2022 from OCBC Bank where he'd held the role of Premier Relationship Manager from mid-2018.

PICTET Wealth Management has appointed **Wesley Lam** – most recently Senior Relationship Manager with Hang Seng Bank – to the position of Private Banker in Hong Kong. Lam spent just under eleven-and-a-half years with Hang Seng Bank – holding his most recent role from Q1 2022. **Kelly Yip** – most recently Head of Business Development with Kasa Singapore – has been appointed to the position of Relationship Manager with Azura Partners in Singapore. Yip spent just under three years with Kasa Singapore – joining Q3 2022 from One Tree Partners where she'd held the role of Director, Malaysia/Singapore HNW Clients for just over three years – joining mid-2019 from VP Bank AG where she'd held the role of Director from Q4 2018. **Bessie Oh** – most recently Senior Vice President with HSBC Global Private Banking – has been appointed to the position of Credit Risk Manager with DBS Bank in Singapore. Oh spent ten years with HSBC Global Private Banking – holding her most recent role from Q1 2023. **Henman To** – most recently Market Business Management, Global Private Banking with HSBC – has been appointed to the position of Associate Director, GPS Business Management with Julius Baer. To spent just over three years with HSBC – joining Q4 2022 from Haitong International Securities Group Limited where he'd held the role of Manager, Team Lead – Business Support Management for just under one-and-a-half years from Q3 2021 – prior to this he'd held the role of Business Strategy Manager [Private Banking] with Bank of China for three years from Q3 2018.

Sonam Gupta – most recently Director, Private Bank with Standard Chartered Bank in Singapore – has been appointed to the position of Senior Private Banker with Westpac in Sydney, Australia. Gupta spent six-and-three-quarter years with Standard Chartered Bank – joining mid-2018 following just over four-and-a-half years with DBS Bank – holding the role of Relationship Manager, Private Clients from Q1 2016 – prior to this holding the role of Senior Relationship Manager with State Bank of India for just under two-and-a-half years from Q3 2011. **Milen Vergov** – most recently Global Delivery Manager OTC Derivatives with HSBC Private Banking – has been appointed to the position of Regional Head Platforms & Projects with DBS Bank in Singapore. Vergov spent seven-and-one-quarter years with HSBC Private Banking – joining Q4 2018 from Standard Chartered Bank where he'd held the role of SVP, Wealth Transformation from Q3 2017 – prior to this he'd held the role of VP Business Change Management with Deutsche Bank for three years from Q3 2014. **Kar Jin Liew** – most recently Client Account Manager with UBS – has been appointed to the position of Private Banking Executive with Barclays in Singapore – she'd spent just over one-and-a-half years with the firm – joining mid-2024 from Credit Suisse. It is reported that Bank of Singapore has appointed **Bernard Heng** to the position of Head of Customized Solutions, effective March 2nd – reporting to Lim Leong Guan, Global Head of Investment Solutions Group. In the role, he will lead the development, management, and execution of complex product and bespoke solutions, with a focus on ultra-high net worth clients. Heng has extensive experience in wealth management and private banking – he'd held senior roles with UBS/ Credit Suisse, including Managing Director and Global co-Head of the Private and Alternatives Group.

It is reported that UBS has appointed **Andrew Bird** to the position of Head of Global Wealth Management [GWM] Australia, effective April 27th. He will also join the bank's GWM management team for Southeast Asia, Japan, India and Australia as well as the Australia country management forum. Based in Sydney, he reports to co-Head GWM APAC Jin Yee Young and locally to co-Country Heads of Australasia Nick Hughes and Greg Peirce. Bird has over thirty years of experience across wealth management and institutional markets, including the last ten years leading National Australia Bank's wealth management arm, JBWere. He first joined JBWere Q3 2016 from UBS where he'd held the role of Executive Director, Market Manager from Q2 2013. **Shirlyn Koh** – most recently Deputy Team Lead with Maybank – has been appointed to the position of Senior Relationship Manager with Singapura Finance

Limited. Koh spent just under four-and-a-half years with Maybank – holding the role of Business Development Manager from Q4 2021. **Cherris Wong** – most recently Chief Operating Officer, Wealth Management North Asia with Deutsche Bank – has been appointed to the position of Head of Business Management & Platform North Asia with HSBC Private Bank. Wong spent just over nineteen-and-a-half years with Deutsche Bank – holding the most recent role from Q4 2018. **Abe Kwok** – former Head of Wealth Management with China Construction Bank [Asia] – has been appointed to the position of Relationship Manager with BPI Wealth Singapore. Kwok spent two-and-three-quarter years with China Construction Bank [Asia] – joining Q1 2019 from RHB Singapore where he'd held the role of Senior Premier Relationship Manager for just over three years from Q4 2015 – he'd most recently held the role of Senior Relationship Manager Offshore with Citi for just over four years from Q4 2021.

Joshua Lewin – most recently Portfolio Strategist with Bridgewater Associates in Singapore – has been appointed to the position of Managing Director, Head of Investment Strategy Asia with JP Morgan Private Bank – he relocates to Hong Kong for the role. Lewin spent just over thirteen-and-a-half years with Bridgewater Associates – holding his most recent role from Q1 2022. **Jensen Hui** – most recently Managing Director with J. Safra Sarasin – has been appointed to the position of Managing Director with LGT Private Banking. Hui spent just over one-and-a-half years with J. Safra Sarasin – joining Q1 2024 from Morgan Stanley where he'd held the role of Executive Director from Q1 2022 – he'd formerly held the role of Executive Director, Private Wealth Management with Goldman Sachs from Q4 2009. **Justin Kang** – most recently Client Director with MA Financial Group – has been appointed to the position of Private Executive with Westpac Private Bank in Sydney, Australia. Kang spent just under six-and-a-half years with MA Financial Group – joining Q4 2019 from Citi where he'd worked for just over seven years – holding the role of AVP Senior [Citigold] RM from Q3 2016. **Jordan McMahon** – most recently Financial Planner with Signate Private Wealth – has been appointed to the position of Private Banker with Macquarie Group in Brisbane, Australia. McMahon spent just over four years with Signate Private Wealth – holding his most recent role from Q3 2024 – he'd formerly held the role of Client Service Officer with Integra Wealth Solutions Pty Ltd for just over three years from Q4 2018.

Noteworthy Talent Moves in the Americas

Within 2026, US private banks are increasingly sharpening their focus on the $50M+ and $100M+ wealth tiers, building bespoke coverage teams and institutional style offerings. The mass affluent and HNW segments are increasingly being pushed toward digital first or hybrid advisory models, freeing senior talent for UHNW clients. As with other regions worldwide, 2026 very definitively marks the point where AI shifts from "innovation project" to front line productivity engine. Banks are rolling out real time portfolio diagnostics, automated tax loss harvesting, AI generated investment proposals, plus predictive liquidity and credit analytics. The chasm between AI mature platforms [i.e. JPM, Morgan Stanley, Goldman Sachs, etc.] and those situated behind is widening quickly. US UHNW clients continue to rotate into private credit, secondaries, infrastructure, and thematic private equity, driven by yield, diversification, and lower correlation to public markets. Concurrently, private banks are expanding partnerships with alternative asset managers to secure differentiated access. Regional wealth hubs continue to shift south; Miami and Texas remain the fastest growing wealth centres, driven by tax migration, entrepreneurship and capital inflows. Private banks are reallocating RM headcount and leadership roles to these hubs, while maintaining New York as the core centre for complex structuring and capital markets access. US private banks continue to prioritise Front Office advisory and RM talent, with active openings across major hubs such as New York, Miami, Texas, and California. Roles such as wealth advisor remain core, with banks seeking advisors who can manage and grow HNW/UHNW portfolios and deliver comprehensive wealth solutions. Many senior level postings explicitly require a transferable book of business, signalling a continued shift toward revenue proven hires rather than developmental profiles. Banks want advisors who can immediately contribute to net new money and deepen wallet share. Hiring in the US in Q1 2026 has seemingly principally been focused on senior RMs with deep UHNW relationships, alternatives distribution specialists plus AI literate advisors. Compensation inflation persists at the top tier, while mid-tier hiring remains muted. The surge in single family offices [especially in New York, Miami, and Texas] continues to pull senior talent out of private banks. In response, banks are building family office style service bundles comprising bespoke lending, co-investment opportunities, plus governance and succession advisory.

LatAM continues to generate new wealth - driven by commodities, energy, agribusiness, and tech enabled entrepreneurship, but it remains unevenly distributed across Brazil, Mexico, Chile, and Colombia. Private banks are focusing on ultra selective UHNW coverage, with a clear pivot toward clients with cross border needs. Despite periodic political shifts, the structural trend holds: LatAM wealth continues to flow offshore, primarily into Miami, New York plus Switzerland. Banks are strengthening cross border desks and bilingual advisory teams to capture this persistent offshore demand. This said, Miami remains the gravitational centre for LatAM private banking. LatAM family offices [especially in Brazil, Mexico, and Chile] are becoming more sophisticated, demanding co investment opportunities, bespoke credit, plus Institutional grade reporting. Private banks are responding with dedicated family office coverage teams and CIO style advisory. LatAM also remains a relationship-driven market, and Q1 2026 hiring reflects that; Banks are aggressively competing for senior bankers with portable UHNW books, advisors with multi-jurisdictional coverage, plus bilingual or trilingual RMs, fluent within English/Spanish/Portuguese.

Citi Private Bank has appointed **Gavin Kim** to the position of Director in New York – he joins from Deutsche Bank where he'd held the role of Director from Q2 2020. Kim spent eleven-and-a-half years with Deutsche Bank. JP Morgan Private Bank veteran **Sarah White** – most recently Managing Director with the firm – has been appointed to the position of Partner, Advisor with Sapient Capital in New York. White spent over thirty-two years with JP Morgan – holding her most recent role with the firm's private banking division from Q1 2004. **Paul Wojcik** – most recently Senior Investment Advisor with PNC – has been appointed to the position of Senior Vice President of Private Wealth Management with Capital Wealth Advisors. Wojcik spent just under seven years with PNC – joining the firm Q1 2019 from BNY Mellon Wealth Management where he'd worked for just under nineteen-and-a-half years – holding the role of Senior Director from Q2 2015. **Joe Petriccione** – most recently SVP, Private Wealth with SYNOVUS – has been appointed to the position of Private Bank Regional Manager with Huntington Private Bank. Petriccione spent just over one-and-a-half years with SYNOVUS – joining Q1 2024 from PNC where he'd held the role of SVP, Private Bank for five years – prior to this he'd held the role of Vice President, Private Wealth with Regions Bank from 2009 until Q2 2019.

Carole Sprague – most recently President, Private Client with Vista Bank – has been appointed to the position of Senior Vice President, Private Banking with Cendera Bank. Sprague joined Vista Bank mid-2024 following just under twenty-five years working for Texas Capital Bank where she'd held the role of Senior Vice President, Private Banker, Private Wealth from Q4 2013. **Leah Grace** – GWIM Credit Portfolio Manager, VP with Bank of America – has been appointed to the position of Senior Private Banker with BNY Wealth in Tampa, FL. Grace first joined Bank of America Q4 2022 from Abbot Downing where she'd held the role of Director of Banking for just under eight-and-a-half years from Q3 2011. **Carolina Costa** – Senior Vice President, Relationship Manager with HSBC Private Banking – has been appointed to the position of Executive Director with Morgan Stanley in Miami, FL. Costa first joined HSBC Private Banking Q1 2014 – holding her most recent position from Q1 2023. **Tom Staley** – most recently Private Client Advisor with JP Morgan Wealth Management – has been appointed to the position of Senior Wealth Management Advisor with Maia Wealth. Staley spent just over eleven years with JP Morgan Wealth Management – joining the firm Q1 2015 from SCHWAB Private Client Investment Advisory Inc. where he'd worked for five-and-three-quarter years – holding the role of Manager, Portfolio Consultant from Q3 2011. **Shawn Hapanowicz** – former National Director, Senior Private Banker with BMO US – has been appointed to the position of Wealth Advisor, Vice President with FNB Wealth Management. Hapanowicz spent just under one-and-a-half years with BMO US – joining Q3 2022 from Morgan Stanley Private Bank NA where he'd held the role of Vice President, Private Banker from Q2 2021 – he'd most recently held the role of Director, Business Development with FAIRWAY Wealth Management LLC for just over two years from Q4 2023.

David Cohen – most recently Private Banking Manager with Grupo Cibest – has been appointed to the position of Vice President of Wealth Management with Singular Wealth Management in Panama. Cibest spent four-and-a-half years with Group Cibest – joining Q3 2021 from Compass Group – where he'd held the role of PWM Associate Director from Q1 2019. Citi has appointed **Joseph Sowin** to the position of Private Banker in Dallas, TX – he formerly worked for Highland Capital Management LP for just under thirteen years – holding the role of Co-Chief Investment Officer, Portfolio Manager from Q2 2019 until Q1 2023. **Chad Gehring** – most recently Executive Director, Banker with JP Morgan Private Bank – has been appointed to the position of Managing Director, Private Wealth Advisor [Family Office] with BMO Wealth Management US. Gehring spent just over ten years with JP Morgan Private Bank – holding his most recent role from Q1 2023. **Alvin Lopez** – most recently Account Manager with Santander Private Banking International – has been appointed to the position of Private Banking Supervisory Principal with Citi. Lopez spent just over two years with Santander Private Banking International from Q1 2024. **Henry Gerkens** – most recently Managing Director with Goldman Sachs – has been appointed to the position of Managing Director, Global Head of Securities-Based Lending [Wealth] with Citi in Dallas, TX. Gerkens spent ten years with Goldman Sachs – joining Q1 2016 from Microsoft – he'd held his most recent position from Q1 2026.

Sanyu Banks – most recently Senior Private Banker with BMO Wealth Management – has been appointed to the position of Senior Private Banker with Columbia Bank in Los Angeles, CA. Banks spent just over three years with BMO Wealth Management – joining Q1 2023 from Bank of America Private Bank where she'd held the role of Private Client Advisor, Senior Vice President for just under five years from Q1 2018 – prior to this she'd held the role of Senior Private Banker, VP with US Bancorp Investments, Inc. for just over seven-and-a-half years from mid-2010. **Breanne Bovara** – most recently Vice President, Wealth Management Advisor with Fifth Third Private Bank – has been appointed to the position of Managing Partner, Wealth Advisor with MOTO Wealth Partners. Bovara spent eleven-and-a-half years with Fifth Third Private Bank – first holding the role of Private Banker from Q3 2014. **Charlotte Sapir** – most recently Private Client Relationship Manager with First Horizon Bank – has been appointed to the position of Consultant, Private Banking with DMMS Holdings, LLC in New Orleans, LA. Sapir spent four years with First Horizon Bank – joining Q1 2022 from IBERIABANK where she'd held the role of Private Banker for just under seven years from Q2 2015 – prior to this she'd held the role of Personal Relationship Banker with Whitney Bank from Q4 2013. **Daniel Giles** – most recently Wealth Advisor, Private Banker with FSB Premier Wealth Management, Inc. – has been appointed to the position of Business Development Associate with Foster Group in Des Moines, IA. Giles spent one-and-one-quarter years with FSB Premier Wealth Management, Inc. from Q4 2024. **Jeb Milam** – most recently Market Sales Manager/Regional Lending Director with Wells Fargo Advisors – has been appointed to the position of Relationship Manager Wealth Management with Vanguard in Charlotte, NC. Milam spent over thirty years with Wells Fargo Advisors.

Maria Luiza Del Roio – most recently Relationship Manager International with Monte Bravo – has been appointed to the position of Relationship Manager with BTG Pactual in Miami, FL. Luiza Del Roio joined Monte Bravo Q3 2025 from XP Private Bank where she'd held the role of Relationship Manager for just under four years from Q4 2021 – prior to this she'd held a LatAm America private banking position with JPMorgan Chase & Co. from Q4 2019. **Marcio Ferracini** – most recently Relationship Manager, Multi-Family Offices with BTG Pactual – has been appointed to the position of Senior Advisor, Active Investment Services with Santander Private Banking International in Miami, FL. Ferracini spent just over five-and-a-half years with BTG Pactual – first joining Q3 2020 from Franklin Templeton where he'd held the role of LatAm Trader from Q3 2018. **Johanna Imhof** – most recently Senior Premier Banker with Wells Fargo – has been appointed to the position of Private Client Relationship Manager with Citizens in Naples, FL. Imhof spent just over four-and-a-half years with Wells Fargo – joining Q3 2021 from Fifth Third Bank where she'd worked for just under five years – holding the role of Preferred Relationship Manager from Q1 2018. **Matan Stein** – most recently Director with Citi Private Bank – has been appointed to the position of Managing Director with BMO Wealth Management US. Stein spent nine-and-a-half years with Citi Private Bank – holding his most recent role from Q1 2024.

Myles Anderson – most recently Senior Financial Advisor with Merrill Lynch Wealth Management – has been appointed to the position of Wealth Management Advisor with Trilogy Financial in San Diego, CA. Anderson spent just under nine years with Merrill Lynch Wealth Management from Q1 2017. **Nicholas Scibelli** – most recently VP, Private Banking with Berkshire Bank – has been appointed to the position of VP, Private Banker with Beacon Bank in MS. Scibelli spent just over ten-and-a-half years with Berkshire Bank – holding his most recent role from Q3 2025. **Kristopher Lewis** – most recently Financial Advisor with Vanguard – has been appointed to the position of Wealth Manager with TUTTLE Wealth in Charlotte, NC. Lewis spent just over eleven years with Vanguard – holding his most recent role from mid-2024. **Brandon Childs** – most recently Senior Vice President with Bank of Texas – has been appointed to the position of Managing Partner with ALTURA Private Finance in Houston, TX. Childs spent just over three years with Bank of Texas – joining Q1 2023 from Merrill Lynch Wealth Management where he'd held the role of Financial Advisor, First Vice President for just over one-and-a-half years from Q3 2021 – prior to this he'd held the role of Private Banker with Frost for just under four years from Q4 2017. **Michelle Swenson** – most recently Senior Private Banker with First Bank & Trust – has been appointed to the position of VP Private Banking with Bell Bank. Swenson spent just over three years with First Bank & Trust – joining Q1 2023 from Alerus where she'd held the role of Financial Guide for just under eight years from Q2 2015.

Samantha Wheaton – most recently Private Wealth Management Specialist with Regions Bank – has been appointed to the position of Private Banker with PNC. Wheaton spent just under four-and-a-half years with Regions Bank – holding the role of Financial Relationship Senior Consultant from Q4 2022 until Q1 2025. **Candace Montoya** – most recently Private Client Banker with JP Morgan Chase Bank NA – has been appointed to the position of Private Banker with UBM Bank in CO. Montoya first joined JP Morgan Chase Bank NA Q1 2021 as Client Advisor – prior to this she'd held the role of Private Client Banker with Chase for just over ten-and-a-half years from Q3 2020. **Conan Ward** – most recently Financial Advisor with Edward Jones – has been appointed to the position of Partner, Wealth Manager with Kingsview Partners in NJ. Ward spent eleven-and-a-half years with Edward Jones – joining Q3 2014 from Morgan Stanley where he'd worked for just under four years – holding the role of Vice President from Q4 2010. **Kevin Fick** – most recently Vice President, Financial Advisor with Jefferson Bank of Missouri – has re-joined Central Bank in the role of Vice President, Director of Private Banking in MO. Fick spent just under nine years with Jefferson Bank of Missouri – joining from his original stint with Central Bank mid-2017.

Michael Chimonides – most recently Private Banking Advisor with CIBC – has been appointed to the position of Private Banker with TD in Toronto, Canada. Chimonides first joined CIBC Q1 2019 as Business Development Manager – he'd formerly held an original stint of over nine years with TD – holding the role of Manager Financial Services from Q2 2016 until Q4 2017. **Khalid Samim** – most recently Senior Relationship Manager, Commercial Financial Services with RBC – has been appointed to the position of Private Banker with Scotia Wealth Management in Vancouver, Canada. Samim spent eight years with RBC – holding his most recent role from Q1 2023. **Jeffrey Gaetan** – most recently Senior Private Banking Advisor [UHNW Family Office] with CIBC in Toronto, Canada – has been appointed to the position of Executive Director with JP Morgan Private Bank in New York. Gaetan spent four years with CIBC – joining Q1 2022 from TD where he'd worked for nine-and-three-quarter years – holding the role of Senior Private Banker [Private Wealth Management] for just over six years from Q4 2015. **Reynaldo Pol** – most recently Financial Advisor with Ameriprise Financial Services LLC – has been appointed to the position of Vice President, Banker with JP Morgan Private Bank in Houston, TX. Pol spent just under eight years with Ameriprise Financial Services LLC – holding his most recent role from Q1 2019.

It is reported that Rothschild & Co has recruited two former UBS Private Bankers to cover Latin America from Switzerland; Zurich-based **Monika Foeth** will reportedly start as Market Team Head Latin America & Managing Director within the Swiss wealth management business on February 2nd. It is understood that **Sara Palomino Arnanz** – Client Advisor HNWI LatAM with UBS – will also join the Latin America team. Foeth first joined UBS Q4 2005 – she subsequently first held the role of Private Banker from Q2 2007. Palomino Arnanz first joined Credit Suisse Q1 2020 as Client Manager – IWM Latin America & Emerging Europe UHNWI. Independent Asset Manager SunPartners has appointed **Olivier Nanzer** – most recently Managing Director with UBS – to the position of CEO of its Swiss entity SunPartners SA. Nanzer spent nineteen years with UBS from Q1 2007. It is reported that Capital Group has appointed **Patricia Hidalgo** to the position of Managing Director to lead its Latin America [LatAM] distribution efforts. Based in the firm's New York office, Hidalgo will report to Mario Gonzalez, Head of Client Group Spain, US Offshore, and LatAM. In her new role, she will help drive Capital Group's strategy to broaden and deepen relationships with institutional investors and distributors across LatAM, including pension fund administrators in Mexico, Chile and Colombia, as well as Central Banks and sovereign wealth funds. Hidalgo joins Capital Group from JP Morgan Asset Management, where she spent over ten years in multiple roles, most recently serving in the role of Head of Alternatives for LatAM. It is understood that Insigneo has appointed **Renato Bisconcini** and **Renato Rizzatti** to the positions of Managing Directors, Investment Professionals, strengthening the firm's presence in the Brazilian market. Bisconcini and Rizzatti join from BTG Pactual, bringing extensive experience managing sophisticated portfolios for UHNW and HNW clients across Brazil.
