The Redstone Search Group

Wealth Management Moves Update

Q2 2026

Welcome to the Wealth Management Moves Update for Q2 2026!

Q2 2026 marked a clear acceleration in global private banking hiring, signalling a shift from the cautious, defensive approach seen throughout much of 2025 towards more targeted investment in growth. While the Americas accounted for the largest share of hiring activity (48%), driven by continued expansion of ultra-high-net-worth and family office capabilities, EMEA remained highly active (38%), led by Switzerland and the UK, with recruitment focused on senior relationship managers, leadership appointments and cross-border coverage. APAC represented 14% of global hiring, where firms continued to strengthen their presence in key wealth hubs such as Singapore and Hong Kong amid sustained regional wealth creation. Across all regions, recruitment was heavily weighted towards experienced senior talent, with firms prioritising Managing Directors, Team Heads and specialist advisory roles over volume hiring, highlighting an industry focused on strategic capability building, client acquisition and long-term growth.

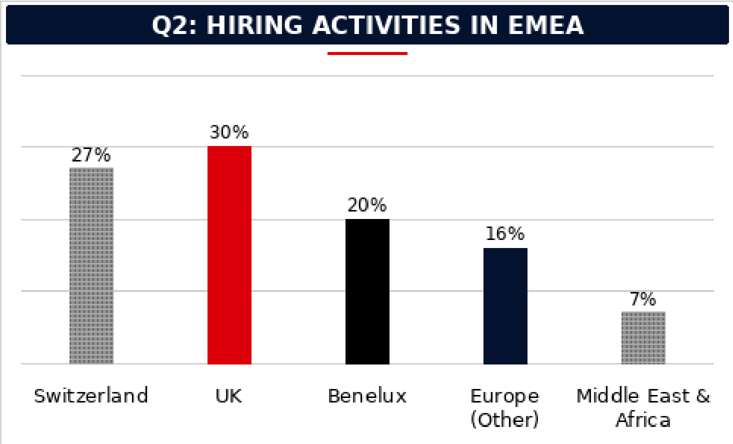
Noteworthy Talent Moves in EMEA

European private banking in Q2 2026 is being shaped by three clear forces: regulatory tightening, jurisdictional repositioning, and the rise of digital-asset-aligned institutions. Together they suggest an industry that is no longer converging around the traditional Swiss–Luxembourg axis, but instead fragmenting into specialised hubs with distinct regulatory and client-coverage profiles. The launch of a fully licensed digital-asset-native private bank in Liechtenstein in April is emblematic of this shift: new entrants are no longer niche fintechs but fully regulated institutions designed from the ground up to integrate crypto custody with traditional wealth management, targeting UHNW clients who now expect seamless digital-asset capability. Against this backdrop, Q2 2026 stands out as one of the most active and structurally significant hiring quarters in recent years. Switzerland has re-asserted itself as the region's dominant booking centre, while independent wealth managers and private investment offices have emerged as the unexpected winners of senior talent. Zurich and Geneva saw concentrated hiring across global and regional platforms, while boutiques absorbed a steady flow of experienced bankers exiting larger incumbents. The Quarter was notably senior-weighted, with multiple MD, ED and Director appointments, alongside a visible rise in leadership roles including CEOs, Heads of Domestic Markets, Country Heads and COOs. Cross-border coverage remained a defining theme, with hires across Middle East, Africa, CEE, LATAM and EAM desks, reflecting the continued internationalisation of EMEA client flows. A quieter but equally important trend was the expansion of non-traditional roles — ESG, AI/process adoption, business management and transformation — signalling that private banks are investing as much in infrastructure and capability as in front-office production. The UK saw a moderate but broad-based uptick in mid-senior hiring, while Luxembourg and Monaco continued to attract COO, wealth-management and senior-banker talent. Overall, Q2 2026 marks a decisive shift out of the defensive posture of 2025 and into a coordinated, senior, multi-platform build-out cycle, with boutiques and Swiss platforms at the centre of gravity.

EFG Private Bank has hired **Déborah Rivière** – most recently Head of Africa with Banque Richelieu – she joins the firm in Monaco in the role of Director, Private Banker. Rivière spent just under eight years with Banque Richelieu – she'd formerly held the role of Private Banker with Société Générale Private Banking for just under two-and-a-half years from Q1 2015 until Q2 2017. Senior Private Banker **Michel Remue** – long-time veteran of ING Belgium – has been appointed to the position of Senior Private Banker with Waterloo Asset Management. Remue spent over twenty-three years with ING – prior to this he'd held the role of Director with Caisse Privée Banque until Q2 2002. **Vít Sedláček** – most recently Director, Relationship Manager CEE with UBS in Zurich, Switzerland – has been appointed to the position of Managing Partner with boutique wealth management outfit HedgeMont. Sedláček spent one-and-three-quarter years in his most recent role with UBS – he'd first joined Credit Suisse in the role of Vice President, Relationship Manager Q3 2022 following seven-and-a-half years with UniCredit Bank Czech Republic and Slovakia AS – holding the role of Private Banker from mid-2016. **Maximilien Tack** – most recently Private Banker with DELEN Private Bank – has been appointed to the position of Private Banker, Family Solutions Advisor with Mercier Van Lanschot. Tack spent five-and-a-half years with DELEN Private Bank – joining Q1 2021 following seven-and-one-quarter years with ING – where he'd held the role of Private Banker from Q2 2017. EFG Private Bank has appointed **Manal Saleh** – most recently Executive Director, Asset & Wealth Management with Goldman Sachs – to the position of Managing Director, Client Relationship Officer – Middle East, Switzerland in Zurich, Switzerland. Saleh spent two years with Goldman Sachs – joining mid-2024 following just over nine years with Credit Suisse where she'd held the role of Head of UHNWI Qatar for one year from Q3 2023. It is understood that Intesa Sanpaolo Wealth Management SA has appointed **Emine Zivali** – Senior Private Banker/Relationship Manager with Banque Havilland SA – to the position of Wealth Manager in Luxembourg. Zivali first joined Banque Havilland SA Q2 2019 – she'd held the role of RM from Q2 2021.

Ilse Gonzalez – most recently Relationship Manager [LATAM Desk] with UBP - Union Bancaire Privée – has been appointed to the position of Senior Officer, Business Management with Triatlum Advisors AG in Geneva, Switzerland. Gonzalez spent three years with UBP - Union Bancaire Privée – joining Q2 2023 from Britannia Wealth Management SA – holding the role of Private Banker, Vice President for eight-and-three-quarter years from Q4 2012 – joining from the role of Analyst with Santander Private Banking International – held from Q4 2010. **Amaro Lopes** – most recently Private Banker with WOODMAN Asset Management AG – has been appointed to the position of Senior Relationship Manager with V Wealth in Geneva, Switzerland. Lopes spent one-and-three-quarter years with WOODMAN Asset Management – joining Q3 2024 from the role of Private Banker with Syz Group – held from Q1 2023 – prior to this Lopes held the role of Senior Relationship Manager with ZEDRA Group from Q2 2019. **Neil van Vuuren** – most recently Executive Director, UHNW Relationship Manager with Julius Baer – has been appointed to an international private banking/wealth management position with MCB Group in Cape Town, South Africa. Van Vuuren spent eight years with Julius Baer – joining Q2 2018 following just over twelve years with FNB South Africa where he'd held the role of Wealth Manager from Q1 2013. **Olivia Nistrup Lamm** – most recently holding a wealth management-focused role with Mirabaud Group – has been appointed to the position of Private Banker with JP Morgan Private Bank in Geneva, Switzerland – she'd spent two-and-three-quarter years with Mirabaud Group from Q3 2023. Secondly, JP Morgan Private Bank has appointed **Mikael de Picciotto** – most recently Investment Advisor with CIGP - Compagnie d'Investissements et de Gestion Privée [CIGP] – to the position of Private Banker in Geneva, Switzerland. De Picciotto spent just over three-and-a-half years with CIGP – first joining in the role of Portfolio Manager, Client Account Manager from Altor Capital Management where he'd held the role of Head of Sales from Q2 2021.

Xavier de Mûelenaere – most recently Private Banker with Bank Degroof Petercam – has been appointed to the position of Senior Private Banker with Mercier Van Lanschot. De Mûelenaere spent over twelve years with Bank Degroof Petercam – joining Q1 2014 from Belfius where he'd held the role of Private Banker from Q1 2013 – prior to this he'd held the role of Financial Advisor with DEXIA for four-and-a-half years from Q3 2008. **Barry Frame** has been appointed to the position of Head of International Private Banking & Wealth Management with SEI in London. Frame most recently held the role of Chief Revenue Officer with VeriPark for just over two-and-a-half years from Q4 2023 – prior to this he worked for Avaloq for just over five-and-a-half years – holding the role of Chief Commercial Officer from Q2 2021. **Sebastian Rasp** – most recently Director, Private Banker with Citi in New York – has been appointed to the position of Executive Director, Client Relationship Manager with Pictet Group in Zurich, Switzerland. Rasp spent two-and-one-quarter years in his second stint with Citi – re-joining Q1 2024 from Deutsche Bank where he'd held the role of Director, Private Banker from Q1 2022 – prior to this he'd held his original stint with Citi for just under seventeen years. **Mark Hassett** – formerly Managing Director with EFG Private Bank – has been appointed to the position of Senior Private Banker with Weatherbys Private Bank. Hassett spent just over three years with EFG Private Bank – joining Q3 2019 from RBC where he'd held the role of Managing Director for close to fourteen years – prior to this he'd held the role of Head of Private Banking with Credit Suisse for just over four years from Q1 2001. **Felix Tölle** – most recently Client Advisor GFIW Europe Domestic, Director Germany Desk with UBS – has been appointed to the position of Vice President, Private Banker with JP Morgan in Hamburg, Germany. Tölle spent ten-and-one-quarter years with UBS – holding his most recent role from Q1 2024.



Anders Dyrup – former Managing Director, Team Head Danish Team with UBP - Union Bancaire Privée – has been appointed to the position of Senior Private Banker with Sparekassen Danmark in Copenhagen. Dyrup spent just under two years with UBP - Union Bancaire Privée – joining the firm in Luxembourg Q1 2024 from Nykredit where he'd held the role of Chief Private Banker for over thirteen years – prior to this he'd held the role of Senior Relationship Manager with Credit Suisse from Q4 2008. **Alessandra Pontello** – most recently Executive Director, Private Banker with MEDIOBANCA – has been appointed to the position of Executive Partner, Banker with Banca Patrimoni Sella & C in Milan, Italy. Pontello spent just under eight-and-a-half years with MEDIOBANCA – joining Q4 2017 from Banca Esperia – she'd formerly held the role of Private Banker with Edmond de Rothschild for just under six years from Q2 2010. **Sonia Gössi** – formerly Head, Switzerland & Europe with Julius Baer – has been appointed to the position of Chief Executive Officer with BG [Suisse] Private Bank SA. Gössi spent just under two years with Julius Baer – joining Q1 2024 following over nineteen years with UBS where she'd held the role of Head of Wealth Management International, Europe North from mid-2018. **Tamara Draxler Vázquez** – most recently Business Manager EAM International, Director with VP Bank AG – has been appointed to the position of Senior Relationship Manager EAM International with Neue Bank AG in Vaduz, Liechtenstein – she'd spent just under four years with VP Bank AG – joining Q3 2022 from Vontobel where she'd held the role of Relationship Manager for just over five years from mid-2017.

Malick Badjie – most recently Global Head of Sales & Marketing with ROBECO in Rotterdam, the Netherlands – has been appointed to the position of Global Co-Head of Sales & Member of the Executive Committee for Pictet Asset Management in Geneva, Switzerland. Badjie spent just over eight-and-a-half years with ROBECO – he'd formerly held the role of Vice President, Head of Africa Institutional Business with BlackRock from Q4 2009 – subsequently joining Silk Invest Q3 2013 in the role of Managing Partner, Head of Investment Solutions. **Andreas Liechti** – most recently Head, Business Development & Architecture [Managing Director, Senior Advisor] with Julius Baer – has been appointed to the position of Head, Premium Clients with Zuger Kantonalbank. Liechti spent just over two years with Julius Baer – he'd formerly spent over fifteen years with Credit Suisse – holding the role of Head of Business Development & Strategy, Private Banking Switzerland from Q4 2019. **Parmbir Gill** – former Portfolio Manager with Coutts – has been appointed to the position of Investment Advisor with Barclays Private Bank in London. Gill spent just under three years with Coutts – holding the role of PM from Q3 2022 – he'd most recently held the role of Investment Manager with Saltus for two-and-a-half years from Q3 2023. Secondly, Barclays Private Bank has appointed **Andrey Lavnikov** – most recently Advisory Specialist, Investment Advisor with UBS – to the position of Vice President, Investment Advisor in London. Lavnikov spent just over ten-and-a-half years with UBS – holding his most recent role from Q3 2025.

Alice Weill – Family Office Relationship Manager with Banque de Luxembourg – has been appointed to the position of ESG Investment Manager with Banque Raiffeisen. Weill joined Banque de Luxembourg in an ESG-focused role Q1 2023. **Guillaume Cauvin** – most recently Priority Banker with BNP Paribas Fortis – has been appointed to the position of Business Developer with DELEN Private Bank in Brussels, Belgium Cauvin spent two-and-one-quarter years with BNP Paribas Fortis – holding his most recent role from Q4 2024. **Marcela Zulin** – most recently Private Banking Analyst [Brazilian Desk] with Santander Private Banking – has been appointed to the position of Associate Relationship Manager with BIL Suisse in Zurich, Switzerland. Zulin spent just under two-and-a-half years with Santander Private Banking – joining Q4 2023 from Clarus Capital Group AG where she'd held the role of Asst. Relationship Manager & Compliance Officer for just over two-and-a-half years from Q2 2021. **Nick Hennigan** – most recently Client Support Officer, Private Banking with EFG Private Bank – has been appointed to the position of Client Service Executive, Wealth Management with Rothschild & Co in London. Hennigan first joined EFG Private Bank Q4 2023. **Katie Brown** – most recently Premier Relationship Director with HSBC – has been appointed to the position of Relationship Manager with Julius Baer. Brown spent just over five years with HSBC – holding her most recent role from Q1 2024.

Shahid Qazi – most recently Managing Director with FAS Family Office – has been appointed to the position of Deputy Chief Executive Officer, Global Head of Wealth Management & Investment Origination with Innvotec Limited. Qazi spent two-and-three-quarter years with FAS Family Office – joining Q3 2023 – he'd formerly held the role of Executive Director, Private Banking with Standard Chartered Bank from Q1 2023. **David Aminadokiari** – most recently Premier Banking Officer with NatWest Group – has been appointed to the position of Private Banking Executive with Arbuthnot Latham. Aminadokiari spent just under one-and-a-half years with NatWest Group – joining Q1 2025 from Ecobank Nigeria where he'd held the role of Relationship Manager, Premier Banking & Wealth Management from Q3 2022. **Khyati Ratan** – most recently Private Banker with ASK Private Wealth in Mumbai, India – has been appointed to the position of Associate Vice President with AMBIT Private Limited in Dubai, United Arab Emirates. Ratan spent just under two years with ASK Private Wealth from Q3 2024. **Thanos Ktenas** – most recently Chief Operating Officer Private Banking with EFG Private Bank Luxembourg – has been appointed to the position of Chief Operating Officer with Alpha Bank in Luxembourg. Ktenas joined EFG Private Bank Luxembourg Q1 2025 following just over seven years with Lombard Odier Group where he'd held the role of Chief Operating Officer European Platform from Q4 2022. **Emilie Béjean** – most recently Senior Private Banker with Pictet Wealth Management in Geneva – has been appointed to the position of Managing Director with Nevastar Finance in Zurich, Switzerland. Béjean spent just under eleven years with Pictet Wealth Management – joining Q3 2015 from HSBC where she'd held the role of Relationship Manager, Brazil for just under two-and-a-half years from Q4 2012 – prior to this she'd worked for UBS Wealth Management for five-and-three-quarter years – holding the role of UHNW Client Advisor from Q3 2008.

Lewis Cole – most recently Vice President, Private Banker with Citi – has been appointed to the position of Associate Director, Wealth Manager [Private Investment Office] with W1M Wealth & Investment Management in London. Cole spent just under thirteen years with Citi – holding his most recent role from Q4 2021. DELEN Private Bank has hired Private Banker **Louis Lemoine** – most recently with BNP Paribas Fortis. Lemoine spent seven-and-three-quarter years with BNP Paribas Fortis – joining Q3 2018 following eight years working for BELFIUS where he'd held the role of Private Banker from Q4 2016. **Leonardo Moro** – most recently Private Banker with UBP - Union Bancaire Privée – has been appointed to the position of Private Banker with Barclays Private Bank in London. Moro spent five-and-one-quarter years with UBP - Union Bancaire Privée – he'd originally held a stint of just over six-and-a-half years with Barclays prior to joining UBP – holding the role of Wealth Management Executive from Q4 2017. **Marc Vankeirsbilck** – most recently Commercial Development Director with Degroof Petercam – has been appointed to the position of Director, Wealth Manager with Deutsche Bank. Vankeirsbilck spent just over eight-and-a-half years with Degroof Petercam – holding his most recent role from mid-2024 – prior to this he'd held the role of Director, Private Banking with ING from Q1 2009. **Andrea Dardi** – most recently Head of UK & Switzerland with Coleman Wealth Private Client Office – has been appointed to the position of Senior Wealth Manager with CREDO in London. Dardi spent one year with Coleman Wealth Private Client Office – joining Q2 2025 from Barclays Wealth Management where he'd held the role of Wealth Manager, Vice President for four years – joining Q1 2022 from LGT Wealth Management where he'd held the role of Wealth Manager from Q1 2021.

Rebecca Gibergues – former Director, Swiss Market Lead with BlackRock – has been appointed to the position of Head of AI & Process Adoption with CMB Monaco. Gibergues spent just under three-and-a-half years with BlackRock – joining Q1 2020 following just under eight-and-a-half years working for Barclays where she'd held the role of Head of EMEA Private Bank Change from Q1 2018 – she'd most recently held the role of Executive Director, EMEA with FS-ISAC from Q1 2024. **Elize Smith** – most recently Head, Private Clients & Private Wealth with FNB Namibia – has been appointed to the position of Head of Private Banking with Capricorn Private Wealth in Windhoek, Namibia. Smith spent just over fifteen-and-a-half years with FNB Namibia from Q4 2010. **Marc Chevalier** – most recently Director, Private Banking with Caisse d'Epargne Ile-de-France – has been appointed to the position of Head of Wealth with Nopillo. Chevalier first joined Caisse d'Epargne Ile-de-France mid-2019 from LCL where he'd held the role of Senior Private Banker from Q4 2018. **Kevin King** – most recently Client Account Manager with UBS – has been appointed to the position of Client Director Asst. with Coutts. King spent just over two-and-a-half years with UBS – joining Q3 2023 from Barclays Corporate & Investment Bank where he'd held the role of Private Banking Executive for one-and-a-half years from Q2 2022. **Edward Wharton** has been appointed to the position of Private Banker with Revolut where he'd held the role of Client Advisor from Q1 2026 – he'd formerly held the role of Investment Associate with Canaccord Genuity Wealth Management for just under three-and-a-half years from Q4 2022.

Noteworthy Talent Moves in Asia

APAC private banking in Q2 2026 is being shaped by three dominant forces: rapid wealth expansion, cross-border regulatory integration, and a structural shift toward private markets and alternatives. The region remains the world's strongest engine of wealth creation, and private banks are reorganising around that momentum. The Asia-Pacific private banking market is projected to grow from USD 44.30bn in 2025 to USD 48.63bn in 2026, continuing toward USD 77.48bn by 2031 at a 9.77% CAGR. This expansion is driven by intergenerational wealth transfer, professionalisation of family capital, and rising cross-border mobility. Regulatory programmes in both hubs are strengthening cross-boundary distribution and reporting frameworks, enabling more portable mandates and larger advised balances. This is reinforcing their role as the region's dominant booking centres. APAC private banking in Q2 2026 has been defined by a decisive regional re-architecture: Singapore and Hong Kong remain the twin super-hubs, but they are diverging into distinct strategic roles. Singapore is consolidating its position as the command centre for Global South Asia, ASEAN and the family-office ecosystem, with banks building out structuring, governance and UHNW advisory capabilities as NRI and FO wealth accelerates. Hong Kong, by contrast, is doubling down on investment-led UHNW coverage, strengthening its bench in multi-asset, FX and platform-specialist roles as North Asia wealth stabilises. Southeast Asia is emerging as the next major frontier, with Thailand, Vietnam and the Philippines attracting senior market-head appointments and onshore build-outs. Meanwhile, India's domestic wealth industry is professionalising at speed, spawning new boutiques and deepening the India–Gulf–Singapore corridor. Across the region, global boutiques such as Julius Baer, Deutsche, RBC, LGT and Lombard Odier are out-hiring the bulge brackets, while Australia and New Zealand continue to mature their domestic UHNW platforms. The result is an APAC wealth landscape that is scaling, segmenting and regionalising, with talent flows mirroring the increasingly multi-polar nature of Asian wealth.

Abhijit Shetty – most recently Executive Director & Team Lead [Private Bank] with Standard Chartered Bank – has been appointed to the position of Managing Director & Head, Global South Asia Team with RBC in Singapore. Shetty spent just under nine years with Standard Chartered Bank – joining Q3 2017 from DBS Bank where he'd held the role of Senior Private Banker for five years from Q3 2012 – prior to this he'd held the role of Market Manager, Indonesia Team Head with ANZ for just over three years from Q3 2009. **Benjamin Ong** – formerly Executive Director, Desk Head, Premier Private Clients with OCBC – has been appointed to the position of Executive Director, Head, Client Relationship [Private Banking] with Bank of China Limited [Singapore.] Ong spent just under three years with OCBC from Q3 2022 – he'd formerly spent over six years with HSBC – holding the role of Senior Vice President, Team Head, HSBC Jade [Private Wealth] from Q4 2018 – prior to this he'd held the role of Director, Private Banker, Regional Private Wealth with Maybank from Q3 2012 until Q2 2015. **Ritika Patel** – most recently Director with UBS – has been appointed to the position of Director with Bank of Singapore. Patel spent just under one-and-a-half years with UBS – joining Q1 2025 from the role of Associate Director NRI/IPB with Citibank – held for just under twelve years from Q1 2013. **Amy Shang** – most recently Head of Institutional Business, Asia ex-Japan with GMO – has been appointed to the position of Head of Sales, Asia ex-Japan with Lombard Odier Investment Managers in Singapore. Shang spent just over four-and-a-half years with GMO – joining Q4 2021 from Dimensional Fund Advisors where she'd held the role of Regional Director, Greater China, Responsible Officer, Head of Official Institutions Asia Pacific for just under eight years from Q1 2014.

Sharon Sim – formerly Chief Executive Officer of Aries Investment Management – has been appointed to the position of Head of Business Development, Asia with Schroders in Singapore. Sim spent just over two years with Aries Investment Management from 2019 – prior to this she'd held the role of Senior Private Banker with Citi from Q3 2018 – joining from the same position with JP Morgan – held from mid-2017. PIMCO has appointed **Enoch Wong** to the position of Account Manager, HK Global Wealth Management – he joins from UBS where he'd held the role of Associate Director, Wholesale Client Coverage from Q3 2025 – joining following four-and-one-quarter years with JP Morgan Asset Management where he'd held the role of Vice President, Direct Business from Q1 2023 – prior to this he'd held the role of Manager, Wealth & Personal Banking for just over five years from Q3 2016. **Anabelle Wang** – most recently Executive Director with Julius Baer – has been appointed to the position of Private Banker, Senior Client Partner & Executive Director with DBS Bank in Singapore. Wang spent just over one year with Julius Baer – joining Q2 2025 following just over three years with JP Morgan where she'd held the role of Vice President from Q1 2022 – prior to this she'd held the role of Investment Representative with Bank of Singapore for five years from Q2 2017. Secondly, **Siang Jin Foo** – most recently Executive Director with Julius Baer – has been appointed to the position of Team Head with Deutsche Bank in Singapore. Jin Foo spent just over two years with Julius Baer – joining Q1 2023 from Credit Suisse where he'd held the role of Executive Director for one-and-three-quarter years from Q3 2021 – prior to this he'd held the role of Senior Director with HSBC from Q1 2017.

Yvonne Leung – most recently Managing Director, Head of Managed Solutions Asia with JP Morgan Private Bank – has been appointed to the position of Head of Multi-Asset Investment Specialist, Asia with HSBC in Hong Kong. Leung spent just under ten years with JP Morgan Private Bank – first joining Q3 2016 as Executive Director, Portfolio Specialist following just under six-and-a-half years working for Goldman Sachs where she'd held the role of Executive Director Private Wealth Management from Q2 2010 – joining from her original five-and-a-half-year stint with HSBC. Julius Baer has appointed **Rajat Sood** – most recently Head, Global Indian & International Clients with DBS Bank – to the position of Executive Director, Private Banking & Wealth Management in Hong Kong. Sood spent just under four-and-a-half years with DBS Bank – joining as District Head, International Banking Q1 2022 following over twenty-one years with ICICI Bank – holding the role of Regional Head, Retail & Business Banking [South East & North Asia] from Q4 2018. **Robert Cruickshank** – most recently Regional Manager [Private], Central New Zealand with ANZ – has been appointed to the position of Head of Wealth/Advice, NZ Regions with MILFORD in Wellington, New Zealand. Cruickshank spent just over fifteen years with ANZ – holding his most recent position from Q1 2019. **Mark Ng** – most recently Director, Investment Advisor [Private Bank] with UOB – has been appointed to the position of Director, Senior Investment Counselor with RBC Wealth Management. Ng joined UOB in Hong Kong Q2 2022 from JMC Capital where he'd held the role of Investment Advisor, Multi Family Office for one-and-one-quarter years – joining Q1 2021 from Deutsche Bank where he'd held the role of Fund/Alternatives Specialist from mid-2020.

Dominic Cheung – most recently Executive Director, Senior Investment Advisor with JP Morgan – has been appointed to the position of Director with Deutsche Bank in Hong Kong. Cheung spent nineteen years with JP Morgan – joining mid-2007 from Bank of Tokyo-Mitsubishi UFJ where he'd held a corporate finance role from Q2 2006. Secondly, Deutsche Bank has appointed **Jitender Singh** – most recently Associate Vice President with HSBC – to the position of Advisor, Private Banking. Singh spent three-and-one-quarter years with HSBC – joining Q1 2023 from Citi where he'd held the role of Affluent Acquisition Manager in New Delhi, India for just over one year from Q1 2022 – prior to this he'd held the role of Wealth Relationship Manager with YES BANK from Q1 2021. **Sudarshan Athreya** – most recently Private Banker, India & International Markets with BNP Paribas Wealth Management – has been appointed to the position of Managing Director, Global South Asia with RBC Wealth Management in Singapore. Athreya spent four-and-three-quarter years with BNP Paribas Wealth Management – joining Q3 2021 from UBP - Union Bancaire Privée where he'd held the role of Director for one-and-one-quarter years from mid-2020 – prior to this he'd held the role of Director, Private Banking [Global South Asia] with DBS Bank from Q3 2018. **Leon Qiao** – most recently Senior Private Banker UHNW with Westpac – has been appointed to the position of Senior Private Banker, Family Office UHNW with ANZ in Sydney, Australia. Qiao spent just under two-and-a-half years with Westpac – joining Q1 2024 from Bank of New Zealand where he'd held the role of Senior Private Banker for three-and-a-half years from Q3 2020 – prior to this he'd held the role of Senior Private Client Manager with NAB from Q3 2019.

Parth Shah – most recently Jnr Relationship Manager with InCred Global Wealth – has been appointed to the position of Private Banker with Julius Baer in Singapore. Shah spent just over one year with InCred Global Wealth – holding his most recent position from Q4 2025. **Poonam Bhardwaj** – most recently Director, Client Relations with KOTAK Private – has been appointed to the position of Managing Partner with Motilal Oswal Private Wealth in Hyderabad, India. Bhardwaj spent three-and-three-quarter years with KOTAK Private – joining Q3 2022 from JM Financial Services Ltd where he'd held the role of Senior Vice President from Q3 2019. DBS Bank has hired Private Banker **Kenneth Su** – most recently with Bank of Singapore. Su spent just over two-and-a-half years with Bank of Singapore – joining Q3 2023 from HSBC where he'd held the role of Associate Director from Q2 2019 – prior to this he'd held the role of Senior Relationship Manager with CIMB from Q2 2017. **Jacqueline Lim** – most recently Private Banker with JP Morgan Private Bank – has returned to UBS in the role of Director, Client Advisor in Singapore. Lim joined JP Morgan Private Bank mid-2023 from her original nine-and-a-half-year stint with UBS where she'd held the role of Associate Director, Client Advisor from Q4 2015. **Anshul Rai** – most recently Associate Director, Global South Asian Markets with Standard Chartered Bank in Singapore – has been appointed to the position of Director with Julius Baer in Hong Kong. Rai spent just under two-and-a-half years with Standard Chartered Bank – joining Q1 2024 from DBS Bank where he'd held the role of Asst. Vice President from Q4 2022. **Curtis Li** has been appointed to the position of Vice President, Private Banking UHNW with JP Morgan in Hong Kong – he joins from Hengdian Group Capital where he'd held the role of Principal in Shanghai, China for just over three years – joining Q1 2023 from UBS where he'd held the role of Associate Director from Q1 2019.

Kelly Luo has been appointed to the position of Associate Director with LGT Private Banking – she joins from CATHAY United Bank where she'd held the role of Deputy Manager, Private Bank for just over four years from Q1 2022 – prior to this she'd held the role of Account Manager with SAXO Markets Singapore from mid-2021. **Elvin Ho** – most recently Executive Director, Wealth Advisor for UHNW SEA Team with JP Morgan Private Bank – has been appointed to the position of Head, Family Office & Structuring Solutions with Bank of Singapore, leading the Family Office and Structuring Solutions Team in Singapore. Ho spent six-and-three-quarter years with JP Morgan Private Bank – joining Q3 2019 following just under nineteen years with UBS where he'd led a Business Risk Competence Center from Q1 2018. **Isabella He** – former Vice President, Global Head of IR & Strategy with I-Mab Biophara – has been appointed to the position of Relationship Manager, Director with Lombard Odier Group in Hong Kong. He spent just over one year with I-Mab Biophara from Q2 2023 – she'd formerly held the role of Vice President with Citi for just over five years from Q2 2016. **Kent Lee** – most recently Director, DAD Lead, FX Product Specialist [Wealth Management] with HSBC – has re-joined Deutsche Bank in the role of Co-Head of FX Advisory, Emerging Markets in Hong Kong. Lee joined HSBC Q4 2022 following his original stint with Deutsche Bank of just under eight years where he'd held the role of Director, FX Advisory [Wealth Management] from Q1 2020.

Matthew Wood has been appointed to the position of Senior Private Banker with Macquarie Group in Perth, Australia – he joins from Wealthwise Financial Planning where he'd held the role of Senior Financial Advisor for one-and-three-quarter years from Q3 2024 – he'd formerly held the role of Principal, Senior Wealth Advisor with INSIGHT Advisory Group for just over four years from Q3 2016. **Mark Robbins** – most recently Private Banker, Wealth Advisory with Bank of New Zealand – has been appointed to the position of Private Wealth Advisor with MILFORD. Robbins spent four years with Bank of New Zealand – joining Q2 2022 from JARDEN where he'd held the role of Senior Dealer, FX for just over two years from Q1 2020. **Neha Sharma** – Director with HSBC Global Private Banking – has been named as Founding Partner of Neo Wealth Partners in Mumbai, India. Sharma first joined HSBC mid-2010 from HDFC Bank where he'd held the role of Senior Advisor, Equities & Private Banking for just under one-and-a-half years from Q1 2009 – joining from Motilal Oswal Securities where he'd held the role of Partner, AVP from Q3 2007. Secondly, **Shalini Bhatia** – most recently Vice President with Barclays Private Bank – has been named as Partners with Neo Wealth Partners. Bhatia joined Barclays Private Bank Q3 2025 from Ask Wealth Advisors – holding the role of Asst. Vice President for over sixteen years from Q1 2009.

Aakriti Chopra – most recently Wealth Service Relationship Manager with HDFC Bank – has been appointed to the position of Associate Vice President, Client Services with 360 ONE Wealth in Delhi, India. Chopra spent just over four years with HDFC Bank – joining Q1 2022 from ICICI Bank where he'd held the role of Customer Service Manager [Private Banking Group] from mid-2021 – prior to this he'd held the role of Service Relationship Manager with Axis Bank for three years from Q3 2018. **Nitin Dhankhar** – most recently Partner, Private Banking [AVP] with YES BANK – has been appointed to the position of Director with Emirates NBD. Dhankhar spent just over one year with YES BANK – joining Q3 2023 from Citi where he'd held the role of Affluent Client Acquisition Manager for one-and-a-half years from Q1 2022 – prior to this he'd held the role of Senior Relationship Manager with IndusInd Bank from Q3 2018. **Rashmi Choudhary** – Director with Avendus – has been appointed to the position of Senior Market Director with ASK Private Wealth. Choudhary joined Avendus Q4 2022 from Kotak Private where he'd held the role of Private Banker from Q3 2022 – prior to this he'd held the role of Private Banker with ICICI Bank from Q1 2012.

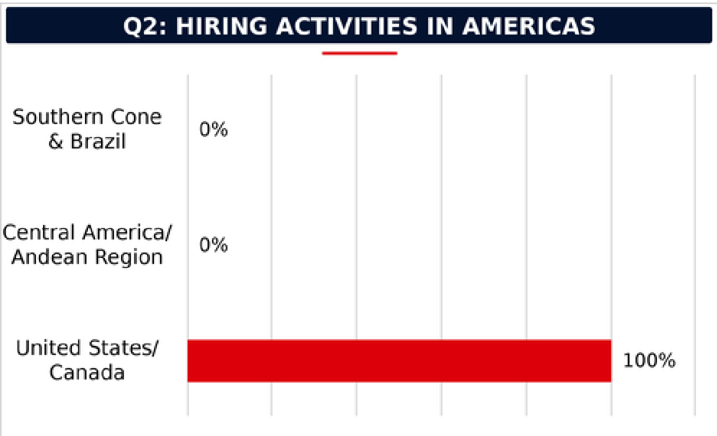
Noteworthy Talent Moves in the Americas

The main theme to take from Q2 2026 within private banking is that the ultra-wealthy are consolidating relationships, not expanding them:
UHNW clients are seemingly reducing the number of banks they work with and concentrating assets with institutions that can deliver credit + alternatives + estate structuring under one roof. This is driving a 'winner-takes-more' dynamic, favouring the largest integrated platforms.
US family offices are expanding CIO-style functions, demanding co-investment, direct deals, and institutional reporting. Private banks are responding by building out family-office advisory units and offering more curated deal flow rather than broad product shelves. Hiring overseen within US private banking in Q2 2026 is defined by decentralisation and competitive realignment, as the market continues to reshape itself after several years of structural shocks. The traditional bulge-bracket platforms remain influential, but they are no longer the gravitational centre of the industry - instead, the landscape is fragmenting into three distinct models: elite UHNW private banks, fast-advancing regional and super-regional wealth platforms, and a growing ecosystem of boutiques, trust companies and newly formed advisory firms. JPMorgan, UBS, Citi and Bank of America are selectively upgrading their benches with senior, investment-led and UHNW-grade hires — including Goldman Sachs and Bessemer Trust alumni — while simultaneously absorbing First Republic DNA to rebuild high-touch coverage on both coasts.

Latin America is simultaneously navigating election cycles in Q2 [Colombia, Peru, Brazil, Costa Rica], shifting US–China influence, and the upcoming USMCA/T-MEC review — all of which shape capital flows, risk appetite, and private-banking strategy. Wealth creation is tied to structural themes: critical minerals, energy security, food production, and AI-linked demand. J.P. Morgan's 2026 outlook frames LATAM as central to global resource needs — especially minerals and energy required for the AI revolution — creating new investment channels for private banks and UHNW clients.

Chad Reddy – most recently Managing Director, Market Leader with Bank of America Private Bank – has been appointed to the position of US West Region Head, Managing Director with Citi Private Bank in San Francisco, CA. Reddy joined Bank of America Private Bank Q3 2010 from City National Bank where he'd held the role of Sales Manager, Senior Vice President for one-and-a-half years from Q2 2009 – prior to this he'd held the role of Wealth Management Specialist with Wells Fargo. **Jeremy Autry** – most recently Senior Vice President, Associate Market Manager with Morgan Stanley – has been appointed to the position of Executive Director, Market Director with UBS in New York. Autry spent just under five-and-a-half years with Morgan Stanley – first joining in the role of Vice President, Business Development Manager from Fidelity Investments where he'd worked for just under five-and-a-half years – holding the role of Financial Consultant from Q3 2018 – prior to this he'd held the role of Regional Marketing Director for Lincoln Financial Distributors for four-and-one-quarter years from mid-2011. **Ryan Buser** – most recently Business Development Director with Morgan Stanley – has been appointed to the position of Private Client Advisor, SVP with Bank of America Private Bank. Buser spent just over five years with Morgan Stanley – first joining Q1 2021 as PWM Associate from BMO Capital Markets where he'd held the role of LevFin/Syndicate Specialist for one-and-three-quarter years from Q3 2019 – prior to this he'd held the role of Senior Associate with Boston Private from Q4 2017.

Kristian Forster – most recently Senior Vice President, Private Wealth Advisor Consultant with US Bank – has been named as Chief Executive Officer, Founding Partner of boutique wealth management outfit HighWater Wealth in San Diego, CA. Forster spent seven-and-three-quarter years with US Bank – joining Q3 2018 from Wells Fargo where he'd held the role of VP, Senior Regional Private Banker from Q3 2014 – prior to this he'd held the role of VP, Senior Client Manager with HSBC from Q3 2010. **Andrew Low** – most recently Senior Vice President, Wealth Management US with UBS – has been appointed to the position of Private Wealth Advisor, MD Investments with Wells Fargo Private Wealth in Newport Beach, CA. Low spent just over six-and-a-half years with UBS – joining Q4 2019 from BNY Mellon Wealth Management where he'd held the role of Vice President, Senior Director for eleven-and-one-quarter years from Q3 2008. **Alexander Burks** – former Vice President, Senior Private Banker with Wells Fargo Bank [Wealth Management] – has been appointed to the position of Senior Vice President, Corporate & Commercial Banking with City National Bank of Florida in FL. Burks spent over eighteen years with Wells Fargo Bank [Wealth Management] – holding his most recent role from Q3 2014 – he'd most recently held the role of Vice President with COMERICA Wealth Management for just over two-and-a-half years from Q3 2023. **Hugo Braune** – most recently Executive Director, Global Families Group with JP Morgan Private Bank – has been appointed to the position of Director with Citi Private Bank in New York. Braune spent just over thirteen years with JP Morgan Private Bank – holding his most recent role from Q3 2022.



Ashley-Brooke Knight – most recently SVP, Private Banker with Enterprise Bank & Trust – has been appointed to the position of Vice President, Private Banking with Misson Valley Bank in Orange County, CA. Knight spent just under two-and-a-half years with Enterprise Bank & Trust – joining Q1 2024 – she'd formerly held the role of Senior Preferred Banker with First Republic Bank for over eight-and-a-half years from Q4 2014 until mid-2023. **Erin Cooper** – most recently Senior Vice President & Senior Relationship Strategist with PNC Private Bank – has been appointed to the position of Senior Relationship Manager with Market Street Trust Company. Cooper spent four-and-one-quarter years with PNC Private Bank – joining Q1 2022 from Cambridge Trust Company where she'd held the role of Vice President & Relationship Manager, Wealth Management for over ten years – prior to this she'd held the role of Portfolio Manager with TD Asset Management from Q1 2008. **Guy Lamb** – most recently Senior Wealth Advisor with MARINER – has been appointed to the position of Private Wealth Advisor, Director with BMO Private Wealth in Sacramento, CA. Lamb spent just under two years with MARINER – joining Q1 2024 from Fifth Third Wealth Advisors where he'd held the role of Managing Director for just over one year from Q4 2022 – prior to this he'd held the role of Senior Vice President, Lead Wealth Management Banker with Wells Fargo Private Bank from Q3 2022. **Rob Beesley** – most recently SVP, Senior Private Banker with Comerica Bank – has been appointed to the position of SVP, Senior Private Banker with Hancock Whitney. Beesley spent just under two years with Comerica Bank – joining Q3 2024 following over ten years with Origin Bank – holding the role of SVP, Regional Manager [Private Banking] from Q1 2017.

Rob Ward – most recently First Vice President, Market Manager with Morgan Stanley – has been appointed to the position of Senior Vice President, Area Manager, Private Wealth Management with Pinnacle Financial Partners in FL. Ward spent just over seven years with Morgan Stanley – joining Q2 2019 from Seaside National Bank & Trust where he'd held the role of Client Advisor for just under three years from mid-2016 – prior to this he'd held the role of Wealth Director with BNY Mellon Wealth Management for two years from mid-2014. **Mary Henning** – VP, Relationship Manager with City National Bank – has been appointed to the position of Wealth Management Private Banker with Fremont Bank in CA. Henning joined City National Bank Q4 2024 from Community Bank of the Bay where she'd held the role of VP, Relationship Manager for one-and-a-half years from Q3 2023 – prior to this she'd held the role of Senior Preferred Banker Asst. Manager with First Republic Bank for seven years from Q3 2016. **Vanessa Stang** – most recently Vice President, Community Business Banking with Wheaton Bank & Trust Company – has been appointed to the position of Private Banker with Byline Bank. Stang first joined Wheaton Bank & Trust Company Q1 2018 following four-and-three-quarter years with BMO Harris Bank where she'd held the role of Manager from Q2 2015. **Chad Kappes** – most recently Vice President, Senior Private Bank Wealth Advisor with Huntington Private Bank – has been appointed to the position of Senior Vice President, Wealth Management Advisor with Fifth Third Private Bank in FL. Kappes spent four-and-a-half years with Huntington Private Bank – joining Q4 2021 – he'd formerly held the role of Vice President, Senior Private Banker with BMO Harris Bank from Q4 2018.

Charles Orozco – most recently Senior Managing Director with CIBC US – has been appointed to the position of Senior Vice President, Group Director with Flagstar Private Bank in Palm Beach, FL. Orozco spent one year with CIBC US – joining Q2 2025 from JPMorgan Chase where he'd held the role of Executive Director for just under two years – joining mid-2023 from First Republic Bank where he'd held the role of Senior Managing Director Relationship Management for just over nine years from Q2 2014. **Zach Granberry** – most recently Managing Director [Private Bank] with Texas Capital – has been appointed to the position of Senior Wealth Strategist with Northern Trust. Granberry spent just over six-and-a-half years with Texas Capital – joining Q3 2019 from Bernstein Private Wealth Management where he'd held the role of Director for just over two-and-a-half years – joining Q1 2017 from JP Morgan Private Bank where he'd held the role of Executive Director from Q1 2006. **Heather Clemmer** – most recently Associate Relationship Manager, AVP with 1st Century Bank – has been appointed to the position of Vice President, PWM Private Banker with US Bank in Newport Beach, CA. Clemmer spent just under two years with 1st Century Bank – joining mid-2024 from Flagstar Bank where she'd held the role of Associate Group Director, Asst. Vice President for one year – prior to this she'd held the role of Client Relations Manager with First Republic Bank from Q3 2020. Secondly, US Bank has appointed **Leo Kelly** – most recently Wealth Advisor with Regions Bank – to the position of Private Banker. Kelly spent two years with Regions Bank – joining Q2 2024 from Busey where he'd worked for just over five years – holding the role of Vice President, Private Wealth Advisor from Q3 2023.

Nick Kapki – most recently Vice President, Private Wealth Management Banker with US Bank – has been appointed to the position of Private Banking Relationship Manager with National Bank of Arizona in AR. Kapki spent sixteen-and-a-half years with US Bank – holding his most recent position from Q4 2022. **Gustavo Pecego** – Senior Financial Advisor, Vice President with Merrill Lynch Wealth Management – has been appointed to the position of Senior Private Banker [HNW] with HSBC in the US. Pecego joined Merrill Lynch Wealth Management Q2 2021 from Wells Fargo Clearing Services LLC where he'd held the role of Financial Advisor, Managing Director for three-and-one-quarter years from Q1 2018 – prior to this he'd held the role of Private Banker, Vice President with Banco Santander International for five-and-a-half years from Q3 2012. **Houman Davoudi** – most recently Managing Director, Private Client Advisor with Bank of America Private Bank – has been appointed to the position of SVP, Private Banker with City National Bank in Beverly Hills, CA. Davoudi spent just under two years with Bank of America Private Bank – joining Q3 2024 from JP Morgan where he'd held the role of Managing Director for one-and-one-quarter years from Q2 2023 – prior to this he'd held a similar position with First Republic Bank from Q1 2021. **Rosanne Peel** – most recently Vice President, Private Banker with Morgan Stanley Private Bank NA – has been appointed to the position of Senior Banking Advisor with PNC in Chicago, IL. Peel spent just over four years with Morgan Stanley Private Bank NA – joining Q1 2022 following seven-and-three-quarter years with BMO Family Office – holding the role of Director, Capital Advisory Services from mid-2014.

Carson Chafe – most recently Associate Director & Team Lead with Scotia Wealth Management – has been appointed to the position of Senior Private Banking Advisor with CIBC Private Wealth. Chafe first joined Scotia Wealth Management in the role of Private Banker Q1 2013 following ten-and-three-quarter years with TD Canada Trust where he'd held the role of Advisor from Q2 2011. **Chad Schwartz** – most recently Vice President, Private Wealth Advisor [Investment Management Division] with Goldman Sachs – has been appointed to the position of Managing Director, Wealth Partner with JP Morgan Wealth Management in New York. Schwartz spent just under eleven years with Goldman Sachs – joining Q3 2015 from Citi where he'd held a corporate FX sales role from Q2 2013. **Seán O'Dowd** – most recently Managing Director with Silvercrest Asset Management in New York – has been appointed to the position of Managing Director, Banker with JP Morgan Private Bank in Greenwich, CT. O'Dowd spent just under seven-and-a-half years with Silvercrest Asset Management – joining Q3 2018 following over twelve years with Bessemer Trust in the role of Senior Vice President from 2006. **Mark Markarian** – most recently Senior Vice President, Wealth Management Consultant with US Bank – has been appointed to the position of Executive Director, Banker with JP Morgan Private Bank in CA. Markarian spent fourteen-and-one-quarter years with US Bank – joining Q1 2012 from First Republic Bank where he'd held the role of Senior Relationship Manager from 2010. In Miami, FL, JP Morgan Private Bank has hired **Pablo Artigas** – most recently Head of Financial Sponsors & Infrastructure with Santander Chile – he joins in a private banking role. Artigas spent seven-and-one-quarter years with Santander Chile – holding his most recent role from Q3 2025.

Brazilian Specialist **Fabio Cristino** – most recently Executive Director with JP Morgan Private Bank – has been appointed to the position of Executive Director with Galapagos Capital in Miami, FL. Cristino spent just under three-and-a-half years with JP Morgan Private Bank – joining Q1 2023 from Santander Private Banking International where he'd held the role of Vice President, Senior Banker from Q2 2019 – prior to this he'd held the role of Managing Director, Investments [Financial Advisor] with Wells Fargo Advisors from Q3 2017. Senior Wealth Management Executive **Juan Carlos Sánchez Costes** – former Senior Vice President, RM with UBS – has been appointed to the position of Vice President with Insigneo in San Diego, CA – he'd spent just under four years with UBS – joining Q2 2019 following just over seven years with Citi in the role of VP, Senior Private Banker HNWI/UHNWI held from Q1 2012 – he was subsequently appointed to the position of Director, Financial Advisor with VectorGlobal WMG Q1 2023. LATAM Specialist **Maria Angelica Berrizbeitia** has re-joined International Finance Bank [IFB] in Miami, FL in the role of VP, Preferred International Banking – she'd originally spent just over four-and-a-half years with IFB from Q2 2017 – subsequently joining Seacoast Bank in the role of VP Global Banking Officer in Q4 2021 – she'd most recently held the role of Vice President, International Business Development with Intercredit Bank NA for just over two years from Q1 2024.
