

The Redstone Search Group

Wealth Management Moves Update

Q3 2026



Welcome to the Wealth Management Moves Update for Q3 2026!

Q3 2026 saw sustained competition for senior private banking talent globally, with institutions continuing to prioritise strategic appointments, international client coverage and specialist advisory capabilities. EMEA remained highly active, particularly across London, Switzerland, Luxembourg and Belgium, where hiring reflected a focus on senior relationship management, leadership and cross-border wealth coverage. APAC/Australasia saw concentrated recruitment activity in Singapore and Hong Kong, with firms

strengthening their investment advisory, UHNW and regional leadership capabilities. Meanwhile, the Americas experienced widespread senior movement across major US financial centres, alongside continued cross-border hiring between the US and Latin America. Across all regions, recruitment remained focused on experienced professionals and targeted team expansion, highlighting an industry increasingly prioritising client acquisition, specialist expertise and long-term strategic growth.

Noteworthy Talent Moves in EMEA

Q3 in EMEA private banking was defined by a visible pattern of senior mobility across London, Luxembourg, Zurich, and Belgium, and the breadth of these moves suggests that several institutions are actively re-shaping their front-office benches ahead of 2027's regulatory and competitive landscape. London continues to act as a gravitational centre for cross-border private banking talent, with multiple senior bankers stepping into international-coverage roles, hinting at renewed emphasis on globally mobile UHNW segments. Luxembourg, meanwhile, saw a notable uptick in senior arrivals from both Nordic and Swiss markets, and this clustering may reflect the jurisdiction's ongoing pull as a booking centre for cross-European wealth and its growing relevance for pan-regional advisory teams. Zurich's activity was more concentrated in investment-advisory and transformation-focused leadership hires, which could indicate that Swiss platforms are prioritising product sophistication and operational modernisation as competitive differentiators. Belgium stood out for its two-way flow of senior bankers between domestic franchises, suggesting that local institutions are recalibrating their coverage models in response to shifting client expectations and the gradual convergence of retail-affluent and HNW propositions. The presence of long-tenured bankers moving into new roles across Belgium and Luxembourg also points to a broader generational refresh, with firms selectively upgrading experience profiles to strengthen succession pipelines. Momentum surrounding ongoing hiring in Monaco continued, reinforcing its position as a specialised hub for UHNW and international-market coverage, and Q3's moves there may reflect heightened competition for cross-border European client segments. A smaller but meaningful theme was the rise of transformation and client-experience leadership hires, signalling that several EMEA platforms are investing in proposition redesign, digital enablement, and service-model consistency as differentiators in a crowded market. Q3 also saw continued movement of senior Middle East-focused bankers into roles across both Europe and Dubai, underscoring the tight linkage between EMEA booking centres and Gulf-based client origination. The fact that some of these moves involved paired banker-and-support-staff transitions suggests that firms are increasingly willing to lift micro-teams to accelerate regional build-outs. Taken together, these patterns give Q3 EMEA a distinctive shape: London strengthening its international-coverage depth, Luxembourg attracting cross-regional senior talent, Zurich focusing on advisory sophistication and transformation, Belgium undergoing domestic realignment, Monaco reinforcing UHNW specialisation, and Europe–Gulf connectivity tightening through coordinated senior hires. The quarter's personnel flows collectively point to an industry preparing for a more competitive, more regulated, and more globally interconnected private-banking environment.

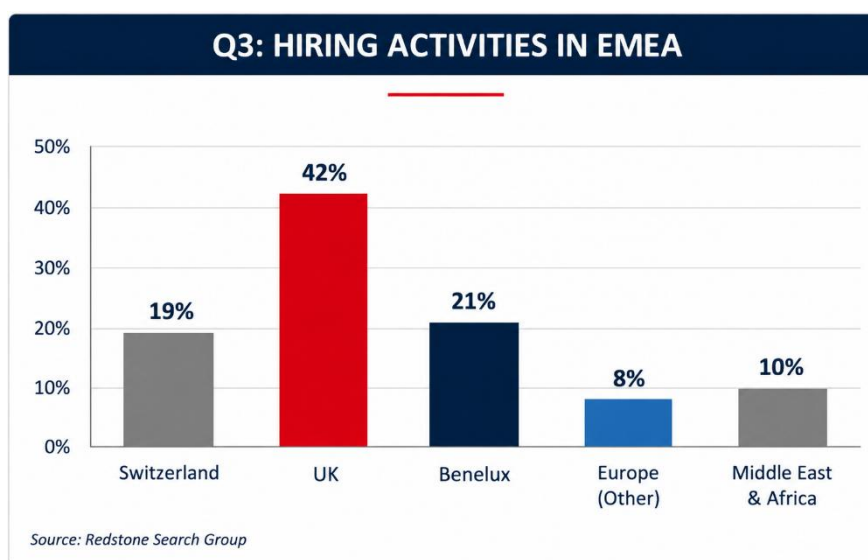
Sam Wilson – most recently Director [Private Wealth] with RBC Wealth Management – has been appointed to the position of Director with UBS in London. Wilson re-joined RBC Wealth Management Q2 2021 following two years in the role of Private Banker with Kleinwort Hambros from Q2 2019 – prior to this he'd held the role of Associate Director with Julius Baer for three-and-three-quarter years from Q3 2015. **Rasmus Bogh** – most recently Chief Investment Advisor with Nykredit in Copenhagen, Denmark – has been appointed to the position of Executive Director with Julius Baer – he relocates to Luxembourg for the new role. Bogh first joined Nykredit Bank in the role of Corporate Relationship Manager Q1 2014 following just under five-and-a-half years with Nordea – where he'd held the role of Relationship Manager from Q3 2012. **Derek Beckman** – most recently Managing Director, Head of Controlling & Performance Management with Vontobel in Zurich, Switzerland – has been appointed to the position of Head of Transformation [Member of the Group Executive Committee] with Quintet Private Bank – he relocates to Luxembourg for the role. Beckman spent just over five years with Vontobel – joining Q3 2021 from UBS where he'd worked for twenty years – most recently holding the role of Managing Director, Global Head Business Risk & Regulatory Management until mid-2021. It has emerged that DELEN Private Bank has hired **Kristof Kustermans** – most recently Chief Executive Officer [Belgium] with Edmond de Rothschild. Kustermans spent just over two-and-a-half years with Edmond de Rothschild – joining Q4 2023 in the role of Commercial Director following over twenty-six years with ING where he'd held the role of Head of Private Banking [Belgium] from Q1 2020.

Long-term KBC Bank & Verzekering employee **Tom Vandewalle** has evidently joined ING Belgium in the role of Senior Private Banker. Vandewalle first joined KBC Bank & Verzekering in a retail banking position 2006 – he'd most recently been named as Wealth Manager [Institutional Clients] with the firm from Q2 2025. **Inge Dewulf** – most recently Private Banker with DELEN Private Bank – has been appointed to the role of Client Advisor, Director with Puilaetco. Dewulf spent over nineteen years with DELEN Private Bank – holding the most recent role of Private Banker from Q2 2007 – she'd formerly worked for KBC Bank & Verzekering for nine years until 2007. Secondly, DELEN Private Bank Private Banker **Dirk Jan Carpentier** has evidently left the firm to join Deutsche Bank in the role of Private Banker in Brussels, Belgium. Jan Carpentier spent just over ten years with DELEN Private Bank – first holding the role of Private Banker from Q1 2022. **Caroline Colin** – most recently Private Banker, Vice President with Barclays Private Bank – has been appointed to the position of Private Banker, Director with CMB in Monaco. Colin spent four years with Barclays Private Bank – joining Q4 2022 following four years with UBS where she'd held the role of Private Banker, UHNW Desk from Q3 2021. **Allana Buckle** – most recently Associate Director, Business Development with Coutts – has been appointed to the position of Senior Private Banker, International with Arbuthnot Latham in London. Buckle spent seven years with Coutts – first joining in the role of Private Banker Q3 2019 following just over eight years with NatWest Group where she'd held the role of Private Banking Manager from Q1 2017.

Pierre Herrmann – most recently Private Banker [International Markets] with BNP Paribas Wealth Management – has joined Indosuez Wealth Management in Luxembourg. Herrmann spent just over one year in his most recent role with BNP Paribas Wealth Management from Q3 2025. **Gareth Welshman** – most recently Director with UBP - Union Bancaire Privée – has been appointed to the position of Private Banker with JP Morgan Private Bank. Welshman spent just over one-and-a-half years in his most recent role with UBP - Union Bancaire Privée – he'd first held the role of Private Banker with Kleinwort Hambros Private Banking from Q3 2015 – prior to this he'd held the role of Associate Director, Relationship Management with Adam & Company from Q3 2010. Secondly, **Ella Hugh** – most recently Director, Proposition, Experience & Enablement with Rathbones – she joined JP Morgan Private Bank in the role of Head of EMEA Client Services, Managing Director. Hugh spent one-and-three-quarter years with Rathbones – joining Q4 2024 from M&G Wealth where she'd held the role of Proposition, Marketing & Insight Director from Q3 2023 – prior to this she'd worked for Aberdeen for just under seven-and-a-half years – holding the role of Head of Client Proposition Asset Management from Q4 2022. **Thomas Lindauer** – most recently Senior Investment Advisor with LGT Private Banking – has joined PICTET Wealth Management in Zurich, Switzerland. Lindauer spent just over fourteen-and-a-half years with LGT Private Banking – first joining the firm in the role of Senior FX Sales Trader/Trading Advisor 2012.

Pierre Martin – most recently Private Banking Advisor with Deutsche Bank – has been appointed to the position of Private Banker with DELEN Private Bank in Belgium. Martin spent eighteen-and-three-quarter years with Deutsche Bank – first joining in the role of Financial Advisor Q4 2007 following just under two-and-a-half years in the role of Senior Financial Advisor with ING from Q3 2005. **David Stephan** – Senior Private Banker with Lombard Odier Group – has confirmed he's been appointed to the position of Executive Director with EFG International in Dubai, United Arab Emirates. Stephan joined Lombard Odier Group Q3 2021 in the role of Senior Private Banker in London following just over four-and-a-half years in the role of Director, Middle East Private Banking with Barclays Wealth Management from Q4 2016 – prior to this he'd held the role of Director, Wealth Planning Middle East with HSBC Private Banking for just under thirteen years from Q1 2004. It is understood that Stephan joins EFG International with **Aida El Gana** – Asst. to Senior Vice President with Lombard Odier Group from Q4 2017. El Gana joined Lombard Odier Group following Asst Relationship Manager roles with Banque Internationale à Luxembourg [BIL], then Falcon Private Wealth from Q4 2014. **Tomas Deleener** – most recently Director, Relationship Manager [Wealth Management] with Deutsche Bank – has confirmed he's joined JP Morgan Private Bank in the role of Executive Director, Banker in Brussels, Belgium. Deleener re-joined Deutsche Bank in his second, most recent seven-year stint with the firm in Luxembourg Q3 2019 in the role of Vice President – prior to this he'd held the role of Wealth Manager with Indosuez Wealth Management for one year – joining Q4 2018 following his first stint with Deutsche Bank where he'd held the role of Personal Financial Advisor from Q1 2017.

Asad Zaidi – Executive Director, Relationship Management with Julius Baer – has been appointed to the position of Head of Private Banking, Member of the Executive Committee with Emirates NBD in London. Zaidi joined Julius Baer Q1 2024 following a two-year stint in the role of Director, Investment Advisory with AITI Tiedemann Global – prior to this he'd held the role of Senior Vice President, Private Banker [UHNW Middle East] with Citi from Q1 2020 – first joining the firm Q1 2017 from JP Morgan. **Tuncay Yilmaz** – most recently Desk Head Wealth Management, Turkey [Managing Director] with UBS in Zurich, Switzerland – has been appointed to the position of Market Head Turkey, Executive Vice President with Lombard Odier Group in Geneva, Switzerland. Yilmaz spent twelve-and-three-quarter years in his second stint with UBS – re-joining Q4 2013 following just over five years in the role of Relationship Manager with BNP Paribas from Q3 2008. **Martina Abrahamsen** – most recently Financing Expert Lead [Corporate & Institutional Clients CIC] with UBS – has been appointed to the position of Executive Director, Senior Relationship Manager [Private Clients – Nordics & Switzerland] with Vontobel in Zurich, Switzerland. Abrahamsen first joined Credit Suisse Q1 2019 following just over ten years with Handelsbanken where she'd held the role of Senior Relationship Manager [Multinationals] in Paris, France from Q1 2011.



Boris Chave – most recently Chief Operating Officer [COO] with Syz Group – has been appointed to the position of COO with ARYA Banque Privée in Geneva, Switzerland. Chave spent just over four-and-a-half years with Syz Group – joining Q1 2022 from JP Morgan where he'd held the role of Executive Director, Head of Client Operations [Onboarding/KYC] from Q3 2016 – prior to this he'd held the role of Global Head of Client Services [Global Private Banking] for HSBC Private Bank from Q1 2012. **Anna Massey** – most recently Director of Business Development with RBC BlueBay Asset Management – has been appointed to the position of Investments Director, UHNWI & Family Offices with Deutsche Bank Private Bank in London. Massey first joined RBC Capital Markets in a multi-asset solutions sales position Q3 2024 following six-and-a-half years with JP Morgan where she'd held an equity derivatives sales position for six-and-a-half years from Q1 2018. **Daniella Andrews** – formerly Head of Marketing & Communications with LAZARD Fund Managers – has been appointed to the position of Senior Relationship Manager with financial services outfit Fundpath in Zurich, Switzerland. Andrews spent three-and-one-quarter years with LAZARD Fund Managers – joining Q1 2023 following multiple roles within Vontobel – most recently Senior Marketing & Campaign Manager Digital Investing, Director from Q3 2021. **Stefan Züchner** – most recently Private Banking Advisor for HNWI Individuals with UBS – has joined Bankhaus Metzler in Hamburg, Germany in a similar position. Züchner joined UBS Q4 2022 following just over six-and-a-half years with Bethmann Bank AG in the role of Relationship Manager, Private Wealth Management from Q2 2016 – prior to this he'd held a similar position with Hamburger Sparkasse for just over five-and-a-half years from Q4 2010.

Danyaal Hasan – former Managing Director, Head of Banking/Lending Franchise with Coutts – has been named as Founder of Swiss AI-native private finance platform ilmay. Hasan spent just over eight years with Coutts – first joining Q3 2012 following eight years with Citi where he'd held the role of SVP, Head of Wealth Management & Retail Banking Products from Q3 2010 – he was subsequently appointed to the position of Head of Products & Professional Services with C. Hoare & Co Q3 2020 – a role he held until Q3 2022. **Eleftherios Sachanidis** – most recently Team Leader, MENA with Standard Chartered – has been appointed to the position of Managing Director with Deutsche Bank in Dubai, United Arab Emirates. Sachanidis spent just under seven-and-a-half years with Standard Chartered – first joining Q1 2019 in the role of Executive Director following just over seven-and-a-half years with Coutts where he'd held the role of Director, Team Head [Saudi & Levant] from Q1 2018. Secondly, **James Ditcham** – most recently Director, Relationship Manager with Standard Chartered – has been appointed to the position of Vice President, Private Banker with Deutsche Bank. Ditcham spent just over seven-and-a-half years with Standard Chartered – he'd first joined the firm in the role of Relationship Manager Q1 2019 from Coutts where he'd held the role of Associate, Wealth Analyst from mid-2018. [It is understood that Sachanidis and Ditcham join Deutsche Bank alongside **Ashkan Anbari** and **Harry Honesty**.]

Ole Herrnkind – most recently Wealth Manager with ODDO BHF – has been appointed to the position of Private Banker with JP Morgan Private Bank in Frankfurt, Germany. Herrnkind spent seven-and-three-quarter years with ODDO BHF from Q4 2018. **Peter Penasse** – most recently Regional Director, Private Banking with Degroof Petercam – has been appointed to the position of Head of Private Banking with Leo Stevens Vermogensbeheer in Antwerp, Belgium. Penasse spent just under eight years with Degroof Petercam – first joining the firm Q3 2018 in the role of Private Banker from BNP Paribas Fortis where he'd worked for just over three years – holding the role of Team Coach/Private Banker from Q3 2016 – prior to this he'd worked for Deutsche Bank for just over five years – holding the role of Personal Advisor from Q1 2015. **Martin Müller** – former Relationship Manager with LBBW Landesbank Baden-Württemberg – has been appointed to the position of Sales Director, Switzerland with IQ-EQ in Zurich, Switzerland. Müller spent three years with LBBW Landesbank Baden-Württemberg – joining Q3 2014 from TARGOBANK where he'd held the role of Relationship Manager from Q3 2013 – he'd most recently held the role of Associate Director, Business Development & Client Relationship Manager with Solutions & Funds [S&F] from Q4 2024. **Werner Vanloock** – long-term Private Banker with BNP Paribas Fortis – has this month joined BELFIUS. Vanloock spent just over eleven-and-a-half years with BNP Paribas Fortis from Q1 2015.

Sammer Nabi – most recently Senior Investment Director, HNWI Client Advisor with Investec Wealth & Investment UK – has been appointed to the position of Director, Wealth Management with RBC Brewin Dolphin in London. Nabi spent just under five years with Investec Wealth & Investment UK – joining Q3 2021 from Citi having held the role of Client Advisor HNWI, UK/Intl for just over two years from Q1 2018 – prior to this he held the role of Investment Advisor [Private Wealth Management] with Julius Baer from Q3 2013. **Emmanuel Andoh** – most recently Portfolio Manager with LGT Wealth Management – has resurfaced in a similar position with Barclays Private Bank in London. Andoh spent one-and-three-quarter years with LGT Wealth Management until Q2 2025 – prior to this he'd held the role of Portfolio Manager with financial services outfit Aberdeen for just over eleven years from Q3 2012. Mercier Van Lanschot has hired **Maxime Pirard** – most recently Director, Private Banking & Wealth Management [Liege] with ING. Pirard spent just under eight-and-a-half years with ING – first holding the role of Private Banker from Q2 2020. **Paul Clifton** – most recently Director, Wealth Planning with Arbuthnot Latham & Co., Ltd – has been appointed to the position of Wealth Manager with LGT Wealth Management. Clifton spent just over six years with Arbuthnot Latham & Co., Ltd – first joining Q3 2020 following just under seventeen years in the role of Chartered Financial Advisor with Hargreaves Lansdown – prior to this he'd held the role of Financial Advisor with Chase de Vere from Q1 2001.

David De La Cruz – most recently Chief of Staff with Citi Private Bank – has been appointed to the position of Head of Commercial Execution [Private Bank] with HSBC. De La Cruz spent just over twenty-two years with Citi – he'd held his most recent role from Q3 2019. **Ellen Jeffery** – most recently Private Banker with Weatherbys Private

Bank – has been appointed to the position of Director, Relationship Manager with RBC Wealth Management in London. Jeffery spent just over two years with Weatherbys Private Bank – joining Q3 2024 from Barclays Private Bank where she'd held the role of Private Banker for just under one-and-a-half years from Q2 2023. **Valeria Papasavva** – most recently Director, Wealth Management Compliance with UBS – has joined Goldman Sachs in the role of Executive Director. Papasavva spent five-and-three-quarter years with UBS – joining Q4 2020 from Meteor Asset Management where she'd held the role of Compliance Officer from Q3 2019 – prior to this she'd held the role of Head of Compliance with MARCUARD HERITAGE for just over two years from Q2 2017. **Jonathan Batley** – most recently Senior Associate, Private Banker with Coutts – has been appointed to the position of Private Banker with Weatherbys Private Bank in London. Batley spent just under nine-and-a-half years with Coutts – holding his most recent role of Senior Associate from Q4 2019. **George Gardner** – most recently Wealth Manager with Moneyfarm – has been appointed to the position of Private Banker with Revolut. Gardner spent just under four-and-a-half years with Moneyfarm – holding his most recent role from Q3 2025.

Kristel Colpin – most recently Front Project Advisor with Puilaetco – has been appointed to the position of Change Expert for ING's Private Banking/Wealth Management business in Brussels. Colpin first joined Puilaetco Q1 2001 – she'd held her most recent role from Q1 2025. **Rhys Ponsonby** – most recently Relationship Manager, Global Strategic Relationships with Lord, Abbett & Co. LLC – has been appointed to the position of Senior Director, Global Financial Institutions [Global Wealth] with PGIM in London. Ponsonby spent four years with Lord, Abbett & Co. LLC – joining Q3 2022 following six-and-a-half years with Deutsche Bank where he'd held the role of Product Specialist [Funds/Solutions] from Q1 2021. **Stephanie Crolla** – most recently Associate Private Banker with UBP - Union Bancaire Privée – has been appointed to the position of Wealth Executive with Nedbank Private Wealth. Crolla spent one-and-one-quarter years with UBP - Union Bancaire Privée – first joining SG Kleinwort Hambros Q1 2022 – she subsequently first held the role of Associate Private Banker with the firm from Q4 2022. **Alex Pettitt** – most recently Associate Private Banker with UBP - Union Bancaire Privée – has been appointed to the position of Client Support Officer with EFG Private Bank. Pettitt first joined Société Générale Private Banking Q3 2022 – he'd first held the role of Associate Private Banker from Q3 2023. **Olena Winter** – Team Lead & Private Client Investment Advisor with Citi – has been appointed to the position of Director, Wealth Manager with Coutts in London. Winter first joined Citi Q3 2012 in the role of Relationship Manager – she was promoted to her most recent role from Q1 2015.

Jessica Van Gysegem – most recently Senior Private Banker with Mercier Van Lanschot – has been appointed to the position of Director, Private Banking & Wealth with ING. Van Gysegem spent two years with Mercier Van Lanschot – joining Q3 2024 following nine-and-one-quarter years with BNP Paribas where she'd held the role of Business Developer [Private Banking] from Q1 2023. **Rafael Trape** – most recently Portfolio Manager with AVANTGARDE Asset Management – has been appointed to the position of Director with EFG Private Bank in London. Trape spent just over two years with AVANTGARDE Asset Management – joining Q3 2024 from RJ+ Asset where he'd held the role of Portfolio Manager for two years from Q3 2022. **Leonard Delicaris** – most recently Relationship Manager with Marbling Financial Group AG – has been appointed to the position of Relationship Manager [External Asset Managers DE] with LLB Banking. Delicaris joined Marbling Financial Group AG Q4 2025 following just over three-and-a-half years with Banque Havilland [Liechtenstein] AG where he'd held the role of Private Banker, Asst. Vice President from Q2 2022 – joining from LIGA Bank EG. **Kieran Montague** – most recently GTM Senior Executive [Direct Wealth] with AVIVA – has been appointed to the position of Private Banking & Wealth Management Marketing Manager with Coutts. Montague spent two-and-three-quarter years with AVIVA – he'd held his most recent role with the firm from Q4 2024. **Damien Hours** – most recently Senior Client Service Officer & Middle Office Support with TradeXBank – has re-joined Indosuez Wealth Management in the role of Business Manager in Zurich, Switzerland. Hours originally spent three years with Indosuez Wealth Management – holding the role of Client Service Officer UHNWI CEE/CIS with the firm from Q4 2021 until joining TradeXBank Q3 2024.

Noteworthy Talent Moves in Asia

Q3 in APAC/Australasia private banking was overwhelmingly shaped by senior hiring activity in Singapore and Hong Kong, and the concentration of moves into these two hubs gives the quarter a distinctly regional centre-of-gravity. Singapore continued to dominate headlines, with a broad mix of senior private bankers, investment advisors, CIO-level talent, and risk-governance leaders stepping into new roles, underscoring the city's position as the anchor for Southeast Asian and pan-Asian UHNW coverage. Hong Kong also saw a meaningful cluster of senior appointments, particularly across China-desk leadership and investment-management functions, suggesting that firms are recalibrating their North Asia propositions despite broader market uncertainty. Australia contributed several noteworthy senior hires, but the overall narrative remained APAC-centric, with domestic moves in Sydney and Melbourne adding depth rather than defining the quarter. A striking feature of Q3 was the presence of multi-personnel lift-outs across different functions – including advisory, support, and leadership roles – which may indicate that firms are accelerating regional build-outs by importing intact micro-teams rather than hiring individuals. This pattern aligns with the increasing complexity of Asian wealth, where team-based coverage models and integrated advisory capabilities are becoming more important for UHNW clients. The quarter also saw a visible

spike in senior hiring during July, and this surge may reflect firms pulling forward recruitment activity ahead of expected regulatory tightening, mid-year compensation cycles, or competitive pressure to secure talent before Q4 strategic planning.

Several senior bankers returned to previous institutions, hinting at renewed competition among regional franchises to reclaim experienced advisors with established client books. Entrepreneurial momentum was another theme, with new boutique wealth-management platforms emerging and attracting senior talent from established institutions, suggesting that alternative advisory models are gaining traction in the region. Investment-advisory and CIO-level moves were particularly active, pointing to a broader industry shift toward more sophisticated portfolio-construction and differentiated investment-strategy capabilities. Cross-border mobility remained strong, with senior bankers relocating from Australia and other markets into Singapore, reinforcing the gravitational pull of regional hubs. Taken together, these patterns give Q3 in this region a distinctive shape: Singapore and Hong Kong absorbing the bulk of senior talent flows, Australia contributing selectively, multi-functional lift-outs accelerating platform build-outs, and July's hiring spike signalling heightened competitive urgency. The quarter's personnel movements collectively point to a region in expansion mode, where firms are racing to strengthen advisory depth, governance capability, and investment sophistication in response to the rapid evolution of Asian private wealth.

Dennis Hong – Market Group Head & Managing Director, Asia Pacific with Bank of Singapore – has been appointed to the position of Regional Market Head, Greater China & North Asia [Private Banking] with UOB in Singapore. Hong first joined Bank of Singapore Q2 2020 in the role of Managing Director & Market Head, Greater China & North Asia prior to this he'd held senior roles with OCBC Bank, plus its wholly-owned brokerage subsidiary OCBC Securities Private Limited – including the role of Managing Director & Executive Board Member with OCBC Securities Private Limited for just over two years from Q1 2018. Secondly, UOB has appointed **Bryan Lee** – most recently Managing Director with Bank of Singapore – to the position of Managing Director, Group Head of Data. Lee first joined Bank of Singapore Q3 2021 – he'd formerly held the role of Chief Data & AI Officer with AXA from Q1 2020. Third, **Judy Chan** – most recently Market Head, Private Banking with Bank of China [Hong Kong] – has been appointed to the position of Managing Director, Private Banking with UOB in Hong Kong. Chan spent four-and-one-quarter years with Bank of China – joining Q2 2022 from HSBC where she'd held the role of Director, Private Banking from mid-2020 – she'd first joined HSBC Q3 2024 in the role of Senior Vice President, Corporate Lending/Relationship Management. Fourth, **John Huang** – most recently Senior Deputy Manager [Private Banking/Credit Advisory] with Cathay United Bank – has been appointed to the position of Vice President with UOB in Singapore. Huang spent just under five years with Cathay United Bank – joining Q4 2021 from Standard Chartered Bank where he'd held the role of Asst. Manager for just under two-and-a-half years from mid-2019 – prior to this he'd held client processing/private banking roles with Credit Suisse, then JP Morgan from Q1 2013 until Q4 2018.

Mike Locsin – most recently Executive Director, Private Banker with Bank Julius Baer & Co. Ltd – has been appointed to the position of Partner, Senior Advisor with LUMEN CAPITAL Investors in Singapore. Locsin first joined Bank Julius Baer & Co. Ltd Q3 2016 from Credit Suisse where he'd held the role of Director, Private Banker for just over eight years from mid-2008 – prior to this he'd held the role of Vice President, Private Banker with Wells Fargo for two years in San Francisco from Q3 2006. **Denise Ho** – most recently Vice President with Bank of Singapore – has been appointed to the position of Vice President with JP Morgan Private Bank in Singapore. Ho spent two-and-three-quarter years with Bank of Singapore – joining Q1 2024 from Credit Suisse where she'd held a similar position for just over nine years from Q4 2014 – prior to this she'd held the role of Associate Director with UBS for thirteen years from Q1 2002. **Allen Tan** – most recently Head of Singapore Regulatory Compliance with LGT Bank [Singapore] Ltd – has been appointed to the position of Chief Risk & Operating Officer with PRIME Asia Asset Management Pte Ltd in Singapore. Tan spent just over two years with LGT Bank [Singapore] Ltd – joining Q3 2024 following just over nine years with Bank of Singapore where he'd held the role of Head of ASEAN Regulatory Compliance – he'd formerly held the role of Head of Compliance [Wealth Management] with First Gulf Bank [Singapore] from Q2 2014 until Q1 2015. It is understood that **Cindy Goh** has left her most recent role as Team Lead Manager with Citi Private Bank to re-join DBS Bank in the role of Executive Director in Singapore. Goh spent four-and-a-half years with Citi Private Bank – joining Q1 2022 from UBS where she'd held the role of Executive Director, Market Team Head for over seventeen years from Q4 2004 – this was preceded by her original stint with DBS Bank of seven-and-one-quarter years until Q4 2004.

It is understood that **Shuna Peng** has left her most recent role as Private Banker with Standard Chartered Bank to re-join OCBC in the role of Private Client Advisor. Peng originally spent just under three-and-a-half years with OCBC in the role of Senior Premier Offshore Relationship Manager prior to joining Standard Chartered Bank Q1 2023 – prior to this she'd held the role of Senior Personal Banker with UOB for one-and-three-quarter years from Q4 2016. It is understood that HSBC has appointed **Lay Hong Tan** – most recently Managing Director with UBS – to the position of Managing Director, Desk Head in Singapore – joining following a tenure of fourteen-and-a-half years with UBS from Q1 2012. **Edwin Tan** – most recently Managing Director, Market Head Thailand & Philippines with DBS Bank – has been appointed to the position of Managing Director, Market Head Southeast Asia with Lombard Odier Group in Singapore. Tan spent two-and-a-half years with DBS Bank – joining Q1 2024 following just over four years with Credit Suisse where he'd held the role of MD, Market Group Head, Philippines, Thailand & Vietnam from Q1 2023 – prior to this he'd held the role of MD, Head of Investment Advisory & Solutions with SCB Julius Baer from Q2 2019. **Amit Bhupatraj Ratadia** – former Senior Private Wealth Advisor with ANZ in

Sydney, Australia – has been appointed to the position of Executive Director, Private Banking with Standard Chartered in Singapore – he'd spent just six months with ANZ – joining Q3 2024 from Credit Suisse where he'd held the role of Senior Relationship Manager for just under one-and-a-half years from Q2 2023 – prior to this he'd held the role of Executive Director, Team Lead with DBS Bank for three-and-one-quarter years from Q4 2019. **Chamikara Wijesinghe** – Executive Director, Head of Wealth & Retail Banking with Standard Chartered – has been appointed to the position of Senior Vice President, Head of Private Banking/Wealth Management with DFCC Bank in Sri Lanka. Wijesinghe first joined Standard Chartered mid-2003 in the role of Relationship Manager following just over five years with ANZ.



Jay See – former long-tenure Relationship Manager [China Desk] with UBS – has been appointed to the position of Team Lead, China Desk [Private Banking] with HSBC in Singapore. See spent eighteen years with UBS – first joining Q3 2008 from ING. **Keith Tan** – former Director with Bank of Singapore – has been named as Co-Founder, CEO of newly-established boutique wealth management firm Golden Acacia Capital Pte Ltd. in Singapore. Tan spent just over four years with Bank of Singapore – joining Q4 2017 from UOB where he'd held the role of Senior Client

Advisor for four years from 2013 – he'd most recently held the role of Equity Partner, CEO of tech/quant-based fund management outfit Finapac Capital Pte Ltd from Q1 2022. The second Co-Founder of Golden Acacia Capital Pte Ltd. is **John Lie** – most recently Executive Director, Investment Advisor with Standard Chartered Bank. Lie spent fourteen-and-one-quarter years with Standard Chartered Bank – joining Q4 2011 from CIBC where he'd held the role of Director for just over four years from Q3 2007. Lie also holds the role of Chief Investment Officer [CIO] with Golden Acacia Capital Pte Ltd. **Hoa Kong Kaan** – most recently Investment Advisor with Bank of Singapore – has been appointed to the position of Managing Director, Senior Investment Advisor with UBP - Union Bancaire Privée. Kong Kaan spent eight years with Bank of Singapore – first joining Q3 2018 in the role of Senior Product Specialist from Credit Suisse where he'd held the role of Portfolio Solutions Specialist for five-and-one-quarter years from mid-2013 – prior to this he'd held the role of Portfolio Counselor with UOB for two years – joining Q3 2011 from a similar position with Citi.

Kelvin Tay – most recently Regional Chief Investment Officer, Managing Director with UBS – has been appointed to the position of Chief Investment Officer, Asia with PICTET Wealth Management in Singapore. Tay spent twenty years with UBS from Q2 2006. **Mohan Subramaniam** – most recently Managing Director, Market Head [Global South Asia] with Bank of Singapore – has been appointed to the position of Managing Director with FARRO Capital in Singapore. Subramaniam spent just over six years with Bank of Singapore – joining Q3 2019 from Citi where he'd held the role of Head, Business Development, International Personal Bank for just over three years from Q3 2016. **David Wang** – most recently Executive Director, Greater China Global Family & Institutional Wealth with UBS – has been appointed to the position of Managing Director with LGT Private Banking in Singapore. Wang spent just over seven-and-a-half years with UBS – joining Q4 2018 from Bank of Singapore where he'd held the role of Associate Director for four years from 2014 – prior to this he'd held the role of Senior Manager, Privilege Reserve with UOB from Q4 2012. Secondly, **Damien Cincera** – most recently Director [Private Bank] with Westpac – has been appointed to the position of Director, Product Solutions with LGT Wealth Management [Australia] in Melbourne. Cincera spent just under fourteen years with Westpac – first joining mid-2012 in the role of Relationship Director, Private Bank – prior to this he'd held the role of Director, Private Banking with Bank of Melbourne for five-and-one-quarter years – joining Q4 2018 from the role of Head of Business Development with NAB – held from Q3 2010.

Travis Lee – most recently Head of Policy & Risk Governance [COO Wealth Solutions Singapore] with Standard Chartered Bank – has been appointed to the position of Head, Investment Solutions Oversight APAC [Wealth Investment Solutions] with Citi in Singapore. Lee spent just under four-and-a-half years in his second stint with Standard Chartered Bank – joining Q1 2022 following five years with UBS where he'd held the role of Head of Cross-Border Regulations & Framework [Business Risk Management] from Q1 2020 – he'd first joined Credit Suisse Q3 2010 in the role of VP, Product Management [Private Bank Sales & Trading COO] Q3 2010. **Damian Robinson** – most recently Executive Director, Head of Advice [NSW & QLD] with JBWere – has been appointed

to the position of Executive Director, Market Team Head [Wealth Management] with UBS in Sydney, Australia. Robinson spent just over ten years with JBWere – first joining Q2 2016 from Morgan Stanley Wealth Management where he'd held the role of Executive Manager, State Manager Victoria for just over five years from Q1 2011. **Yao Chen** – most recently Client Account Manager [Global Family/Institutional Wealth] with UBS – has been appointed to the position of Relationship Manager with Standard Chartered in Singapore. Chen spent just over nine-and-a-half years with UBS – holding her most recent role from Q4 2021. **Kieran Lam** – most recently Investment Advisor [Portfolio Reviews] with Julius Baer – has been appointed to the position of Investment Manager with Deutsche Bank in Hong Kong. Lam first joined Julius Baer Q4 2020 from Bank of Singapore where he'd held the role of Associate, Strategic Business Management from Q3 2019. **Aldrin Sudirgo** – most recently Private Banker with DBS Bank – has been appointed to the position of Vice President, Private Banking with JP Morgan in Singapore. Sudirgo joined DBS Bank Q4 2025 from Julius Baer where he'd held the role of Private Banker for just under one-and-a-half years from mid-2024 – prior to this he'd held the role of Private Client Advisor with Credit Suisse for just over three years from Q3 2019 until Q4 2022.

Lawrence Goh – most recently Market Head ASEAN with UBP - Union Bancaire Privée – has been appointed to the position of Managing Director, Wealth with Azura Partners in Singapore. Goh spent just over two years with UBP - Union Bancaire Privée – joining Q4 2023 from Standard Chartered Bank where he'd held the role of Managing Director & Deputy Market Head ASEAN for two-and-one-quarter years from Q3 2021 – prior to this he'd worked for Bank of Singapore for ten-and-a-half years – holding the role of Executive Director, Private Wealth Management from Q1 2017. **Melanie Lobb** – most recently Senior Private Banker with Westpac – has been appointed to the position of Private Bank Executive with Commonwealth Bank in Melbourne, Australia. Lobb spent just over four-and-a-half years in her second stint with Westpac – joining Q1 2022 from National Australia Bank where she'd held the role of Senior Private Client Manager for just over two-and-a-half years from mid-2019 – this was preceded by her initial stint with Westpac where she'd held the role of Business Development Manager from Q3 2015. Secondly, **Cam Barrett** – most recently Private Banker with Bank of New Zealand – has been appointed to the position of Private Banker with Commonwealth Bank in Sydney, Australia. Barrett spent just under four years with Bank of New Zealand – joining Q4 2022 from ASB Bank where he'd worked for four years – holding the role of Private Banking Relationship Manager from Q1 2021 – prior to this he'd held the role of Personal Banker with ANZ from Q4 2017. **Jasmine Weilun Hu** – most recently Asst. Vice President with EFG Private Bank – has been appointed to a global FO/Wealth Management role with UBS in Hong Kong – she'd spent just over two years with EFG Private Bank – joining Q4 2023 from Bank of Singapore where she'd held the role of Analyst from Q3 2022.

Diksha Manglani – most recently Private Wealth Advisor with Goldman Sachs – has returned to JP Morgan Private Bank in the role of Client Advisor in Singapore. Manglani spent just under one-and-a-half years with Goldman Sachs – she'd formerly spent just under five-and-a-half years in her original stint with JP Morgan Private Bank – first holding the role of Client Advisor from Q2 2022. **Gloria Sun** – Managing Director & Senior Market Head, Private Banking with DBS Bank – has been appointed to the position of Managing Director, Head of Taiwan Market International with HSBC. Sun joined DBS Bank Q4 2024 from Deutsche Bank where she'd held the role of MD, Market Head Greater China for just over seven-and-a-half years from Q2 2017 – prior to this she'd held the role of Head of Private Banking with The Bank of East Asia [BEA] for just over three-and-a-half years from Q4 2013. **Rachel Slade** – former Group Executive, Business & Private Banking with NAB – has resurfaced in the role of Non-Executive Director for ANZ. Slade spent just over eight-and-a-half years with NAB – holding her most recent role from Q2 2024 until Q3 2025 – she'd formerly held the role of General Manager, Global Transactional Services with Westpac Group from Q3 2014 until Q2 2016. **Franko Leung** – former Senior Business Relationship Manager with Standard Chartered – has been appointed to the position of Associate Director [Private Banking] with Bank of China in Hong Kong. Leung spent just under three years with Standard Chartered from Q1 2022 – he'd most recently held the role of Vice President with Fubon Financial Holding Co., Ltd. for just over one-and-a-half years from Q4 2024. **Matthew Bade** – most recently Private Banker with Macquarie Group – has been appointed to the position of Private Wealth Advisor with Encore Private Wealth in Gold Coast, Australia. Bade spent just under thirteen years with Macquarie Group – first holding the role of Private Banker from mid-2019.

Edward Lam – most recently Head, FX Advisory with Deutsche Bank Private Wealth Management in Hong Kong – has been appointed to the position of Executive Director with JP Morgan Private Bank. Lam spent just over eighteen years with Deutsche Bank Private Wealth Management – joining mid-2008 following two years in the role of Executive Director with Goldman Sachs from Q3 2006. **Hubert Wang** – Sales Team Manager [North Asia] with Standard Chartered Bank – has been appointed to the position of North Asia Private Banker with DBS Bank in Singapore. Wang joined Standard Chartered Bank Q1 2022 following just over ten years with OCBC Bank where he'd held the role of Offshore Premier Manager for three years from Q2 2019. **Chris Parker** – most recently Private Client Manager [Private Wealth] with NAB – has been appointed to the position of Private Banker with Commonwealth Bank in Melbourne, Australia. Parker spent just under five-and-a-half years with NAB – holding his most recent position from Q1 2023. **Malcolm Chai** – most recently Client Account Lead [Greater China Market – Global Family Office, UHNW] with UBS – has been appointed to the position of Associate Director, Private Banking Relationship Manager with RBC in Hong Kong. Chai spent just over six years with UBS – joining Q3 2020 from Julius Baer where he'd held the role of Asst. Relationship Manager for three years from Q3 2017 – prior to this he'd held the role of Financial Consultant with OCBC Bank from Q2 2016.

Carlo Kejia Liu – most recently Offshore Premier Senior Relationship Manager [North Asia] with HSBC – has been appointed to the position of Private Bank Relationship Manager [Offshore, North Asia] with DBS Bank. Kejia Liu joined HSBC Q4 2022 from OCBC Bank – holding the role of Offshore Premier Relationship Manager [North Asia] from Q1 2021 – this was preceded by two-and-a-half years in the role of Relationship Manager with UOB from Q3 2018. Shaw and Partners Financial Services has appointed **Mark Harris** – Private Banker with Macquarie Group – to the position of Senior Private Wealth Advisor in Brisbane, Australia. Harris joined Macquarie Group Q2 2019 from UBS Wealth Management where he'd held the role of Director, Client Advisor for just under three years from Q4 2012 – he'd formerly held the role of Director, Private Client Wealth Management with Merrill Lynch for two-and-one-quarter years until Q4 2001. **Kimberline Ng** – most recently Director of Client Engagement & Marketing with Bank of Singapore – has been appointed to the position of Head of Marketing, Asia with Barclays Private Bank in Singapore. Ng spent just under thirteen years in her most recent role with Bank of Singapore – joining Q4 2013 from HSBC Private Bank where she'd held the role of Associate Director, Head of Marketing & Communications SEA for just under nine years from Q4 2004.

Amonrat Srisarntiwong – most recently Relationship Manager, Chinese Corporate [Wholesale] with Bangkok Bank – has been appointed to the position of Senior Client Advisor [Private Banker], VP with UOB in Singapore. Srisarntiwong spent just over ten-and-a-half years with Bank of China from Q4 2015. **Thaveesha Perera** has been appointed to the position of Senior Relationship Officer, Private Banking with Nations Trust Bank PLC in Colombo, Sri Lanka – she joins from Hatton National Bank PLC [HNB] where she'd worked for seven-and-three-quarter years – most recently holding the role of Banking Associate from Q2 2025. **Lynn Ng** – most recently Asst. Relationship Manager with Standard Chartered Bank – has been appointed to the position of Client Relationship Partner with Phidelis Capital Pte Ltd in Singapore. Ng spent just under one year with Standard Chartered Bank – joining Q4 2025 from a similar position with J. Safra Sarasin – held for two-and-three-quarter years from Q4 2022. It is understood that Citi Private Banker **Chris Teoh** has joined HSBC. Teoh first joined Citi in the role of Senior Associate Banker Q3 2018 following one year in the role of Associate with BNP Paribas Wealth Management from Q3 2017.

Noteworthy Talent Moves in the Americas

Q3 in the US private-banking market was marked by a broad wave of senior mobility across Miami, New York, California, Texas, and the broader East Coast, giving the quarter a distinctly multi-hub character. Several major institutions executed coordinated multi-hire expansions, including noteworthy double-moves or triple-moves out of large private-banking franchises, signalling intensified competitive pressure for mid-senior advisory talent. Miami continued to strengthen its position as a key centre for cross-border and international-wealth coverage, with multiple senior bankers stepping into roles tied to global families and international client segments. New York saw a dense cluster of senior private-bank and wealth-advisory hires, suggesting that firms are reinforcing front-office benches ahead of expected shifts in UHNW client behaviour and market volatility. California remained active, particularly across senior lead-banker and relationship-management roles, reflecting ongoing demand for advisory talent in West Coast entrepreneurial and tech-aligned wealth segments. The quarter also featured several senior bankers returning to previous institutions, hinting at renewed efforts by major franchises to reclaim experienced advisors with established books and long-standing client relationships. A visible theme was the movement of senior talent into boutique or specialised wealth-management platforms, suggesting that alternative advisory models continue to attract bankers seeking differentiated client propositions. Governance, operations, and investment-advisory leadership hires added depth to the quarter, pointing to a broader industry focus on operational resilience and more sophisticated investment-strategy delivery. The presence of multiple senior hires into regional banks and community-bank wealth platforms underscores the continued decentralisation of US private banking, with smaller institutions competing more aggressively for experienced talent. Taken together, Q3 in the US private-banking market reflects a competitive, multi-hub hiring environment defined by coordinated expansions, cross-institutional flows, and a strengthening of advisory and operational capability across both national and regional platforms.

LATAM-linked hiring in Q3 showed a clear pattern of senior mobility between Brazil or Miami, underscoring the tight integration between onshore advisory platforms and US-based booking centres serving regional UHNW families. Several senior wealth-planning and investment-management professionals moved into cross-border roles, suggesting that firms are strengthening their ability to serve internationally mobile LATAM client segments with more sophisticated advisory and structuring capabilities. The emergence of senior bankers transitioning from US-based franchises back into Brazilian partnership-style platforms highlights the continued appeal of entrepreneurial wealth-management models within the region. Taken together, these moves point to a LATAM

private-banking landscape that is becoming more interconnected, more cross-border, and more competitive, with firms actively upgrading senior talent to capture the next phase of regional wealth growth.

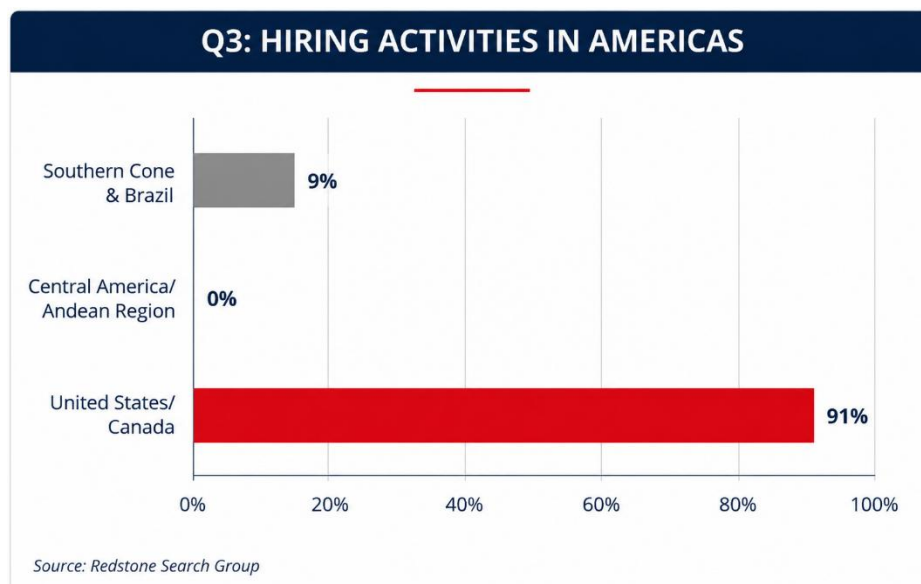
Christopher Fundaro-Stewart – formerly Director of Business Development with Griffin Asset Management – has been appointed to the position of Senior Business Developer with Vontobel in Miami, FL. Fundaro-Stewart spent just under four years with Griffin Asset Management – joining mid-2019 from Charles Schwab where he'd held the role of International Stock Plan Consultant for one year – he'd most recently held a senior strategic accounts role with Veo Technologies for two-and-one-quarter years from Q2 2024. Goldman Sachs has executed a double-hire of two Private Bankers from JP Morgan Private Bank: **James Edwards** – most recently Vice President, Private Banker with JP Morgan Private Bank – has been appointed to the position of Vice President [Private Wealth/Asset Management] with Goldman Sachs. Edwards spent one-and-three-quarter years with JP Morgan Private Bank – joining Q4 2024 from First Republic Bank where he'd briefly held the role of Vice President, Wealth Advisor from Q3 2022 – prior to this he'd held the role of Wealth Planning Associate/Advisor with UBS for six-and-one-quarter years from mid-2016. Secondly, **Evan Wilkinson** – most recently Private Banker with JP Morgan Private Bank – has been appointed to the position of Vice President, Private Wealth Management with Goldman Sachs in New York. Wilkinson spent seven-and-one-quarter years with JP Morgan Private Bank from Q2 2019. **Jinjin Zhang** – most recently Executive Director, Global Families Group with JP Morgan Private Bank – has been appointed to the position of Financial Advisor with UBS in New York. Zhang spent just over five years with JP Morgan Private Bank – joining Q3 2021 from Morgan Stanley where she'd held the role of Vice President, Global Investment Office for just over six years – joining Q3 2015 from the role of Consultant, held with Deloitte for two years from Q3 2013.

Nishan Paranawitane

– most recently Director, Senior Private Banker with BMO Wealth Management – has been appointed to the position of Executive Director, Senior Lead Wealth Management Banker with Wells Fargo in CA. Paranawitane spent just over two years with BMO Wealth Management – joining Q3 2024 from COMERICA Wealth Management where she'd held the role of Private Banking Advisor, SVP from Q1

2023 – she'd formerly first held the role of Regional Private Banker [AVP] with Wells Fargo for just under thirteen years from Q1 2001. **Gregory Shefrin** – most recently Executive Director, Wealth Management Banker with Wells Fargo Private Bank – has been appointed to the position of Private Banker with Flagstar Bank in New York. Shefrin spent just over six-and-a-half years with Wells Fargo Private Bank – he'd formerly held the role of Senior Vice President [Wealth Management] with BBVA Compass for just over one year from Q2 2015. **Andrea Freiman** – most recently Senior Vice President with UBS – has been appointed to the position of Senior Vice President, Private Client Advisor with Bank of America Private Bank. Freiman spent two-and-three-quarter years with UBS – re-joining the firm Q4 2023 following over ten-and-a-half years with JP Morgan Private Bank where she'd held the role of Executive Director from Q1 2022 – she'd first held the role of Analyst in her original tenure with UBS from Q3 2012.

Nicolas Pinto – most recently Senior VP, Private Banker with Citi – has been appointed to the position of Senior Private Banker with ASA. Pinto spent just under seven years with Citi – holding his most recent role from Q1 2025 – prior to joining Citi he'd held the role of Wealth Manager with Watts Capital for two-and-one-quarter years from Q3 2017. Secondly, **Jorge Chico** – most recently Banker [Private Bank] with JP Morgan – has been appointed to the position of Private Banker with ASA in New York. Chico first joined JP Morgan Q2 2019 from Merrill Lynch where he'd held the role of Private Wealth Associate within the firm's Private Banking & Investment Group from Q3 2018. Third, **Guilherme Fonseca** – most recently Executive Director with JP Morgan – has been appointed to the position of Executive Director with ASA. Fonseca spent just over seven years with JP Morgan – joining Q3 2019 in the role of Vice President in Miami, FL – prior to this he'd held a similar position with Safra National Bank of New York – joining Q2 2017 following three-and-three-quarter years with Deutsche Bank from Q3 2013. **Wyman Wong** – formerly Director, Private Banking with SVB Private – has been appointed to the position of Senior Vice President, Director of Private Banking with West Coast Community Bank in San Francisco. Wong spent four years with SVB Private – joining Q1 2021 – he'd formerly spent sixteen years with Boston Private – holding the role of Senior Vice



President, Western Region Private Bank Group Manager from Q4 2020 – he'd most recently held the position of Senior Vice President [Manager, Branch Sales] with First Citizens Bank for one-and-three-quarter years from Q4 2024.

Don Janevski – most recently Private Banker, First Vice President with Morgan Stanley Private Bank – has been appointed to the position of Wealth Management Banker with RBC Wealth Management. Janevski first joined Morgan Stanley Private Bank Q3 2015 from Silver Financial Capital Group where he'd held the role of Asst. Vice President for just under six years from Q3 2009. Secondly, **Jordan Hoerter** – Vice President, Private Banker with Morgan Stanley – has been appointed to the position of Wealth Management Private Banker with RBC Wealth Management. Hoerter first joined Morgan Stanley Q3 2019 from Associated Bank. **Casey Candelario** – most recently Relationship Manager with Flagstar Private Bank – has been appointed to the position of Vice President, Private Banking with BNY Wealth in San Francisco, CA. Candelario spent three-and-one-quarter years with Flagstar Private Bank – joining mid-2023 from First Republic Bank where he'd held the role of Senior Client Services Associate for just over four years from Q2 2019. **Mark Sopcik** – most recently Vice President, Banker with JP Morgan Private Bank – has been appointed to the position of Senior Vice President, Wealth Advisor with Bessemer Trust in Tampa, FL. Sopcik spent two-and-a-half years with JP Morgan Private Bank from Q1 2024. **Kyle Gregory** – most recently Financial Advisor with Frost – has been appointed to the position of Investment Executive with Fifth Third Securities in Houston, TX. Gregory spent seven-and-one-quarter years with Frost – first joining mid-2019 in the role of Private Banker following just over four-and-a-half years with JP Morgan where he'd held the role of Private Client Banker from Q1 2017.

Michael Tessler – most recently Executive VP & COO Wealth Management [Global Tech/Operations] with Broadridge – has been appointed to the position of Managing Director [Wealth Operations], Head of Investment Advisory & US Brokerage Operations with Citi. Tessler spent five years with Broadridge – joining Q3 2021 from Wells Fargo where he'd held the role of Operational Risk Business Oversight Leader for just under two years from Q4 2019. Bank of America has hired Private Banker **Ben Price** – most recently with Citi. Price spent just over four-and-a-half years with Citi – joining Q1 2022 from VRA Partners where he'd held the role of Investment Banker for two years from Q1 2020 – prior to this he'd held a similar role with Truist Securities for over nine years from Q4 2010. Secondly, **Ben Lasater** – most recently Executive Director, Banker with JP Morgan – has been appointed to the position of Private Client Advisor with Bank of America Private Bank in Jupiter, FL. Lasater spent just over three-and-a-half years with JP Morgan – joining Q1 2023 from Goldman Sachs where he'd held the role of Vice President for just over three-and-a-half years from mid-2019. Citi Private Bank has appointed **Christopher Skrelja** – Head of US Private Bank Deposits with Goldman Sachs – to the position of Director, Head of Deposits & Treasury Management [NAM/LatAm.] Skrelja first joined Goldman Sachs Q4 2009 – he'd held his most recent role from Q2 2022. **Chris Kane** – most recently Vice President, Relationship Manager with M&T Bank – has been appointed to the position of Senior Director with Citizens Private Bank in Boston, MS. Kane spent just over two years with M&T Bank – joining mid-2024 from JP Morgan where he'd held the role of Vice President for just under five-and-a-half years from Q1 2019 – prior to this he'd held the role of Credit Associate with Berkshire Bank from Q1 2018.

Duggins King – formerly Senior Wealth Management Private Banker, Vice President with Wells Fargo Private Bank – has been appointed to the position of Senior Vice President, Senior Private Client Relationship Manager with First Horizon Bank in Tampa, FL. King spent just over fourteen years with Wells Fargo Private Bank from Q4 2010 – he'd most recently held the role of Wealth Management Advisor, Vice President with Fifth Third Private Bank for just under two years from Q4 2024. **Molly Baumberger** – most recently Senior Vice President, Senior Relationship Manager with Northern Trust Corporation – has been appointed to the position of Senior Wealth Manager with Eton Advisors Group LLC in Miami, FL. Baumberger spent nineteen-and-three-quarter years with Northern Trust Corporation – holding her most recent role from Q1 2021. **D'Angelo Johnson** – most recently Vice President, Head of Private Banking [Central Iowa] with MidWestOne Bank – has been appointed to the position of VP, Private Banking Relationship Manager with GreenState Credit Union. Johnson spent just under two-and-a-half years with MidWestOne Bank – joining Q1 2024 following fifteen-and-three-quarter years with Bankers Trust where he'd held the role of Regional VP, Private Banking Manager from Q4 2017. **Juliana Cuervo** – former Private Banker with JP Morgan Private Bank – has been appointed to the position of Private Banker with Citi in Houston, TX. Cuervo spent just under four years with JP Morgan Private Bank – joining Q2 2020 following just under fourteen years working for Amerant where she'd held the role of Senior Investment Consultant from 2017.

Cory Boggs – most recently Wealth Manager with Manchester Capital Management LLC – has been appointed to the position of Managing Director, Wealth Advisor with Cresset in CA. Boggs spent nine-and-one-quarter years with Manchester Capital Management LLC – joining Q2 2017 from City National Bank where he'd held the role of Private Client Investment Analyst from Q1 2016. **Katie Bifulco** – most recently Business Relationship Manager with JP Morgan – has been appointed to the position of Vice President, Commercial Private Banker with BankUnited in New York. Bifulco first joined JP Morgan Q1 2017 in the role of Private Client Banker, AVP from HSBC where she'd held the role of Relationship Manager, AVP for one year from Q1 2016 – prior to this she'd held the role of Relationship Banker with Capital One from Q4 2012. **Kenneth Yang** – most recently Business Relationship Manager, FVP [Private Banking] with East West Bank – has been appointed to the position of Senior Banking Advisor, Vice President with PNC in Los Angeles, CA. Yang joined East West Bank Q3 2025 – he'd formerly worked for First Republic Bank for just under eight years from Q4 2015 – holding the role of Senior Relationship Manager from Q4 2022. **Ginger Kapinos** – former Vice President, Deposit Portfolio & Relationship

Manager with First Citizens Bank – has resurfaced in the role of Vice President, Private Bank Office with Citizens Private Bank. Kapinos formerly held the role of Vice President, Relationship Manager with Boston Private – spending twenty-four years with the firm prior to its acquisition by Silicon Valley Bank in 2021.

JP Morgan Private Bank has hired **Chandon Glenn** – most recently Asst Vice President, Wealth Management Banker with Wells Fargo. Glenn spent three-and-a-half years with Wells Fargo – holding his most recent role from mid-2024. JP Morgan Private Bank has appointed **Joseph Powanda** – former Financial Advisor with Modera Wealth Management – to the position of Vice President, Banker in FL. Powanda spent just under four-and-a-half years with Modera Wealth Management from Q2 2021. UBS has appointed **Caroline Borges Costa** – most recently Wealth Planner with Bradesco Global Private Bank – to the role of Director – she'd spent just under three years with the firm – joining Q3 2023 from XP Inc. Secondly, UBS has appointed **Renato Ticoulat** – former VP, Wealth Manager with Julius Baer Family Office in São Paulo, Brazil – to the position of Senior Vice President in Miami, FL. Ticoulat spent seven years with Julius Baer Family Office – joining Q3 2013 from JP Morgan – he'd most recently held the role of Global Investment Manager, ED with Galapagos Capital for just over three years from Q3 2023. **Jaime García-Nieto** has been appointed to the position of Director of Private Banking with Safra National Bank in Aventura, FL – he joins from JP Morgan Private Bank where he'd worked for just over four years – holding a specialist role within the firm's LATAM/Global Families Group from Q2 2025 – prior to joining JP Morgan Private Bank he'd held the role of Wealth Management Associate with Morgan Stanley from mid-2021. **Alvaro Catão** – most recently Director with Safra National Bank in Aventura FL – has been appointed to the position of Partner, Private Banker with Grupo Ável in Florianopolis, Brazil. Catão spent only eight months with Safra National Bank – joining Q1 2025 from StoneX Group Inc. where he'd held the role of Managing Director for one-and-a-half years from Q2 2023 – prior to this he'd held the role of Vice President Wealth Management with UBS for two-and-three-quarter years from Q3 2020.

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