

A close-up portrait of a young woman with long, wavy blonde hair and blue eyes, smiling warmly. She is wearing a white top and a black blazer, with a delicate necklace featuring a circular pendant. The background is a soft-focus office setting with light-colored walls and windows.

 citywealth

2016
future 
leaders **100**

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Welcome to the second edition of the Future Leaders list, which has become our annual feature of rising stars under 40 in the private wealth industry. In this editorial project, we highlight those in the wealth management sector globally.

All the young professionals included in this Top 100 list have been gathered by extensive editorial research and are recommended by industry peers, charities and UHNW clients. Although they are still in the early stages of their careers, these recommendations recognise the years of study and hard work that enabled them to reach their current positions.

I would like to offer my congratulations to those who have made our Top 100 Future Leaders list 2016.



Marcela Kunova
Editorial Assistant

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future

leaders

A W A R D S

2016

Entry deadline:

1 Sept 2016

Online voting:

15 Sept -15 Oct 2016

Following the success of the inaugural Citywealth Future Leaders Awards event in 2015, Citywealth is delighted to bring its second awards event to the private wealth industry. Following a call for submissions with deadline 1 September, judges, who will be chaired by Karen Jones, Editor, Citywealth, will then meet at a lunch to create a shortlist for the industry to vote on. These awards are open to the wider wealth management industry and were devised following the success of the Citywealth Tomorrow Club, which mentors young professionals in their first and second job and the WP Club, which brings together wealth professionals looking to expand their client database and share opinions. Following the period of voting, judges will be informed of results and then asked to make their final choices to find the winners.

The winners will be announced at a gala cocktail reception on 10 November. The event will be preceded by a two hour coaching seminar with leading speakers helping to shape career management and leadership thinking. The event will also provide peer networking to help gain new contacts and ultimately UHNW client referral and mandates.

The following categories are available for entry:

Accounting

Accountant of the Year
Business Development Initiative of the Year
Team/CSR Initiative of the Year

Law

Lawyer of the Year
Family Lawyer of the Year
Business Development Initiative of the Year
Team/CSR Initiative of the Year

Trust

Trustee of the Year - Institutional
Trustee of the Year - Boutique
Business Development Initiative of the Year
Team/CSR Initiative of the Year

Family Office

Family Office Individual of the Year
Business Development Initiative of the Year
Team/CSR Initiative of the Year

Private Banking

Private Banker/Investment Manager of the Year - Institutional
Private Banker/Investment Manager of the Year - Boutique
Business Development Initiative of the Year
Team/CSR Initiative of the Year

Submissions

Please send entries by email to Tzvetelina Petkova: tpetkova@citywealthmag.com

NB. All award entries are treated in the strictest confidence.

Further information

Calin Lapuste, Relationship Manager, Citywealth

Email: clapuste@citywealthmag.com

Office: 020 7487 5858

Accountants

James Arrowsmith

Private Client Manager
Frank Hirth
England



Ross Annand

Private Client Manager
Frank Hirth
England



Andrew Dixon

Partner
Moore Stephens
Isle of Man

As partner in the firm at the age of thirty, Andrew continues impressing colleagues, direct reports and, importantly, clients with his leadership, professionalism and style.



Russell Gibson

Senior Manager
Deloitte
England



Ammar Hamza

Financial Adviser
PwC
England



Accountants

Jo Hurley

Tax Manager
Deloitte
England



Adam Sheffield

Director
Deloitte
England

Supporting his promotion to director in June, one client said: "I was very impressed with Adam's capability to deal with people. He is one of the key reasons we are using Deloitte all over".



Richard Simm

Senior Manager
PwC
England



Trevor Warmington

Director
Rawlinson & Hunter
England



Christa Worth

Supervisor
Moore Stephens
Isle of Man



Financial Advisory & Special Services

Emma Bell

Director of Partnerships
SPF Private Clients
England



Samuel Lush

Adviser - Financial Services
KPMG
England



Lawyers

Stuart Adams

Senior Associate
Penningtons Manches
England



Fraser Allister

Associate
Ogier
Cayman Islands



Lawyers

Helen Barnett

Associate
Bircham Dyson Bell
England



Patricia Boon

Associate
Gowling WLG
England



Matthew Braithwaite

Partner
Bircham Dyson Bell
England



James Bradford

Senior associate
Charles Russell Speechlys
England

James is personable, diligent and efficient and our clients have regularly expressed their gratitude to us for introducing them to Charles Russell Speechlys and noted the quality of the service received.



Daniel Brandon

Solicitor
Kingsley Napley
England



Lawyers

Guy Broadfield

Solicitor
Bircham Dyson Bell
England



James Brockhurst

Senior Associate
Gowling WLG
England

James has a fantastic attention to detail and he knows his international tax law. A safe pair of hands for high net worths.



Zoë Camp

Partner
New Quadrant Partners
England

Zoe is an adviser who deals with domestic and international clients, advising on taxation, financial and legal issues. Her "hard skills" of deep technical knowledge and ability are delivered with the "soft skills" of a warm, humorous and confident bedside manner.



Catja Carrell

Solicitor
Butler Snow
England



Helen Clyne

Associate Solicitor
Debenhams Ottaway
England



Lawyers

Amelia Anne Beringer

Associate
Gordon Dadds
England

Amelia has rapidly built up her own practice from internal and external recommendations, and is regarded as a highly competent lawyer and a safe pair of hands.



Katie Doyle

Associate
Mishcon de Reya
England



Thomas Duggins

Partner
Charles Russell Speechlys
England



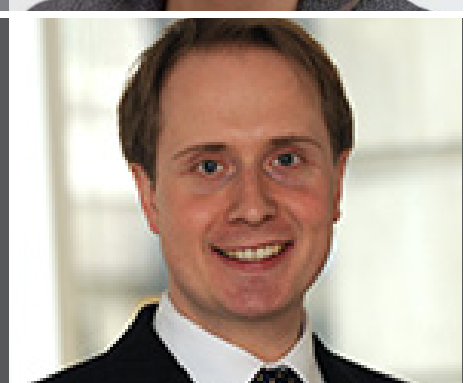
Lucy Edwards

Senior Associate
Penningtons Manches
England



Lewis Edwards

Associate
Bircham Dyson Bell
England



Lawyers

Katie Hawksley

Associate
Boodle Hatfield
England



Hannah Gearey

Senior Associate
Penningtons Manches
England



Emma Heelis-Adams

Senior Associate
Burgess Salmon
England

Emma's attention to detail when advising clients, taking into account each client's individual circumstances, means that she consistently provides top quality technical legal advice. Clients appreciate Emma's calm, efficient and friendly approach and her ability to explain complex matters in a clear and accessible manner.



Josephine Howe

Managing Associate
Ogier
Jersey



Sevyn Kalsi

Associate
Ogier
Jersey



Lawyers

Charlotte Knight

Senior Associate
Gowling WLG
England



Tristram van Lawick

Senior Associate
Charles Russell Speechlys
England



Carol-Ann Le Boutillier

Senior Associate
Hatstone Lawyers
Jersey



Mark Lindley

Associate
Boodle Hatfield
England



Benjamin Lister

Senior Associate
Taylor Wessing
England



Lawyers

Alfred Liu

Associate
Gowling WLG
England



Kate Molan

Associate
Penningtons Manches
England



Edward Porter

Associate
Michelmores
England



Caroline Rao

Principal Associate
Gowling WLG
England



Sakhjit Randhawa

Senior Associate
Charles Russell Speechlys
England



Lawyers

Alexa Saunders

Trusts and Private Wealth Partner
Carey Olsen
Jersey



Gemma Townsend

Solicitor
Gilbert Stephens
England

Gemma is approachable and her elderly clients in particular respond well to her unique and personable style.



Michael Westbrook

Senior Associate
Burgess Salmon
England



Polly Wilkins

Associate
Schillings
England

If you don't want to unexpectedly find yourself in the media spotlight, then it helps to have Polly by your side. She helps businesses and successful individuals to understand and deal with the reputational and privacy issues that have the potential to put them in the spotlight. She is incredibly well versed at putting in place strategies to help clients better protect themselves.



Gemma Willingham

Senior Associate
Baker & McKenzie
England



Private Bankers & Investment Managers

Grace Addison

Private Banker
Barclays Wealth
England



Alessandro Audero

Client Development
Capital Generation Partners
England



Thomas Allsup

Assistant Portfolio Manager
James Hambro & Partners
England



Ross Bridger

Investment Manager
Rathbones
England

His combination of an approachable and affable disposition with robust technical expertise gives Ross a tangible credibility. These attributes also mean that Ross readily forges strong relationships with clients, colleagues and industry professionals alike.



Ana Castillo

Asset Management Assistant
Banque Havilland
England



Private Bankers & Investment Managers

Samuel Chung

Senior Associate
Citi Private Bank
England



Jessica Fox

Assistant Relationship Manager
Seven Investment Management
England



Peter Gale

Senior Relationship Manager
C. Hoare & Co
England



Lauren Garey

Private Banker
J.P. Morgan
England

Lauren has leadership characteristics – clarity of focus, entrepreneurial mind-set, courage and tenacity – that encourage others to follow in her footsteps.



James Goodhew

Investment Director
Rathbones
England

James has been integral in the growth of the team's AUM from sub £150m to £400m in just eight years, and has subsequently been entrusted with developing his own client book, which has grown to over £50m of funds under management.



Private Bankers & Investment Managers

Simon Heathcoat Amory

Investment Manager
Rathbones
England

Clients are reassured by Simon's calm demeanour and ability to build good personal and working relationships with them and their advisers, and as such he is now using this network to successfully grow his client base, while continuing to offer existing clients a first class service.



David Kness

Investment Manager
Rathbones
England

Now managing portfolios worth over \$40m for private clients, David provides an excellent service, demonstrating his commitment to them as well as to the firm.



William Ladenburg

Head of Client Relationships
Sparrows Capital
England



Freddie Lower

Portfolio Manager
C. Hoare & Co
England

Freddie comes across as an extremely competent banker with an engaging manner able to easily network with more seasoned (read old) professionals. I suspect he will achieve great things as his interpersonal skills will lead him to grow very strong bonds with his clients.



Archie MacLellan

Investment Manager
Canaccord Genuity Wealth Management
England



Private Bankers & Investment Managers

Marina Nikoloska

Client Adviser
UBS Wealth Management
England



Joshua Oakley

Assistant Fund Manager
Waverton Investment Management
England



Michael Pickett

Fund Manager
Cazenove Capital Management
England



Holly Rosier

Portfolio Manager
C. Hoare & Co
England

I really appreciate Holly's exceptional qualities: she is polite, honest and researches things fully. She explains things in a simple and understandable manner, and I have total trust in her advice and in her as a person.



Ekaterina Savelyeva

Associate Director
Plurimi
England & Russia



Private Bankers & Investment Managers

Charlotte Swing

Portfolio Manager
Cazenove Capital
England



Oksana Torbych

Private Banker
Barclays Wealth
England



Rebecca Tunstall

Investment Manager
Rathbones
England

Rebecca leverages her international background to manage offshore funds for Rathbones' global clients, including US passport holders. Her ability to deal with complex clients with difficult portfolio structures has contributed to the rapidly growing number of IFC portfolios and the team's success in this area.



James von Simson

Investment Director
Tilney
England



Lucy Walter

Investment Manager
Brewin Dolphin
England



Private Bankers & Investment Managers

Annabel Watson

Portfolio Manager
C. Hoare & Co
England

Annabel is a very positive individual who has transferred her sporting skills to her work. She works hard and also is prepared to get fully involved on complex issues whilst always making herself available for discussions especially in difficult circumstances.



Trustees

Greta Allman

Trust Manager
Saffery Champness
Guernsey



Ross Belhomme

Executive Director
Saffery Champness
Switzerland



Hannah Bisson

Assistant Manager
Butterfield Trust
Guernsey

Hannah is very intelligent, articulate and a particularly quick study able to rapidly recognise and solve complex problems. She possesses in depth technical expertise, a totally professional attitude and a friendly approach.



Trustees

Victoria Blackburn

Manager
Crestbridge
Jersey



Carly Bowen

Assistant Manager
Crestbridge
Jersey



Donna Brehaut

Assistant Trust Manager
Nerine
Guernsey



Victoria Brouard

Assistant Manager
Butterfield Trust
Guernsey

Victoria is a self-starter, highly motivated with very well developed technical as well as interpersonal skills. She goes the extra mile to ensure that her clients are always kept well informed in a very timely fashion.



Danielle Cottignies

Assistant Manager
Crestbridge
Jersey



Trustees

Eleanor Doherty

Trust Officer
Affinity Trust
Jersey

Eleanor is an exceptional talent within our busy trust team and is a cornerstone for many of our key client and intermediary contacts. She is able to manage a challenging workflow in an efficient and effective manner whilst displaying a level of maturity and composure beyond her years.



Darren English

Director Private Client Services
JTC
Jersey



Nick Ford

Trust Manager
Saffery Champness
Guernsey



Matthew Gilligan

Assistant Manager
Louvre Trust
Guernsey

He is unflappable and professional while at the same time he is warm and empathetic and has a great sense of humour. He has a composure and wisdom beyond his years which causes clients to trust him with their assets and their families' futures.



Paulina Harvey

Manager Private Client Services
JTC
Jersey



Trustees

Marina Le Gallez

Assistant Trust Manager
Nerine
Guernsey



James Le Page

Trust and Company Manager
Butterfield Trust
Guernsey

James is a highly capable and practical trustee. He has a very pragmatic and meticulous approach in ensuring that the administration of our various trusts and businesses is always well taken care of.



Nicola Mauger

Assistant Manager
Butterfield Trust
Guernsey

John-Michael McCann

Trust Manager
Abacus Trust
Isle of Man



Jonathan Melamet

Accounts Executive
HMSA
England



Trustees

Joanne Morse

Senior Trust Officer
Summit Trust International
Switzerland



Chris Maurant

Senior Trust Officer
Fairway Trust
Jersey

Chris is a passionate and motivated senior trust officer who excels in every aspect of his role, in particular, developing business with our clients in the Middle East. I have no doubt that he has the right skills and attributes to help take the business forward and has all the makings of a future leader.



Paul Tucknott

Executive Director
Saffery Champness
Switzerland



Clare Usher-Wilson

Director
Summit Trust International
Switzerland



Chris Woodward

Associate
Affinity Trust
Jersey

Chris has started to display his leadership qualities to make it through to executive positions. He is investment qualified and his intellect and thoughtful reflections has rewarded him a seat in the investment committee.



Trustees

Naro Zimmerman

Business Development Executive

Nerine

Guernsey

