



VALENTINE THOMAS

— & PARTNERS —

People Moves | Wealth
Management

2025 Midyear Review

People Moves | Wealth Management

Please see below a midyear update on the latest people moves within the wealth management industry. Please do get in contact with the team if you would like to discuss any topics relating to talent in the investment or wealth management areas.

- **7IM** has named **Tom Glossop** as **Head of Microsoft Platform**, and **Nick Allen** as **Chief Integration Officer**. Additionally, **Nicky Snow** has joined as **Business Development Manager for the Northwest**. Furthermore, **Matthew Yeates** and **Shanti Kelemen** have joined as **Co-Chief Investment Officers**, taking over from Chief Investment Officer, **Martyn Surguy**, who is **leaving** the firm later this year.
- **Allfunds Group's** Founder and Group Chief Executive, **Juan Alcaraz**, is **stepping down**, but will remain in an advisory role for the next 12 months to support the leadership transition.
- **AlphaSwiss** has appointed **Daniel Elias** as **Partner, Deputy Chief Executive and Chief Operating Officer**. Formerly, Daniel was Global COO at Lombard Odier and was a member of the Executive Committee.
- **Arbuthnot Latham's** Director, **Colin MacKenzie**, has **left** and Head of Specialist Private Banking, **Daniel Saxby**, has **retired** from the firm.
- **Avaloq** has appointed **Dr Heiko Beck** as **Managing Director for Europe**. Heiko was previously Chief Executive at Deutsche WertpapierService Bank.
- **Barclays** has appointed **Mathias Gonzalez** as **Chief Investment Officer of Barclays (Suisse) SA** and **Head of Investments for Private Bank in Switzerland and Dubai**, and **Felicity Selcoe** as a **Private Banker**. Additionally, **Gordon Scott** has been named **Head of Private Bank and Wealth Management Division** for the North of the UK.
- **Barclays Private Bank** has appointed **James Whybrow** as **Managing Director**. James was previously Desk Head for London HNW Business and Regional Head for UBS in the Midlands.
- **Bentley Reid** has appointed **Matt Finch** as **Director of Wealth Management**, **Ava Glenn** as **Wealth Management Executive**, and **Henry Taylor** as **Investment Operations Analyst**.
- **BlueOrchard** has promoted **Michael Wehrle** from Head of Investment Solutions and Private Equity to **Chief Executive Officer**.
- **BNP Paribas Wealth Management** has appointed **Alexis Wu** as **Market Head in Hong Kong** and **Beat Bachmann** as **Chief Executive** of its German operations.
- **Bordier & Cie** has appointed **Alois Sommer** as a **Limited Partner**.
- **BRI Wealth Management** has appointed **Chris Clement** as **Senior Portfolio Manager**. Previously, Chris was a Portfolio Manager at Barclays Wealth and Investment Management. Additionally, **Toni Meadows** has joined as **Head of Investments**.
- **Brooks Macdonald** has appointed **James Goward** as **Head of Sales Enablement** and **Ben Johnson** as **Head of Business Development Directors**, and **Karen Charlery** as **Chief Operating Officer**. Additionally, Head of Wealth, **Alex Charalambous**, has **left** the firm, and **Neil Cowell** has joined as **Distribution Director**. Furthermore, **Debbie Dalzell** has been named **Chief People Officer**, and **Josh Lewsey** has joined as **Group Strategy and Corporate Development Officer**. Finally, Brooks Macdonald has appointed **Stephen Martin** and **Alan Riddell** as **Senior Investment Managers** and **Vicky Drysdale** as **Head of Adviser Solutions, Scotland**.
- **Brown Advisory** has promoted **Nick Andjel** from Deputy Head of UK Private Clients and Charities to **Head of UK Private Clients and Charitie**.
- **Brown Shipley** has appointed **Kate Richardson** as a **Client Adviser** in its London team, **Paul Williams** as **Head of Compliance**, and **Elizabeth Pindar** as a **Client Adviser** based in Leeds. Additionally, **Thomas Clarke** has joined as a **Client Adviser** in Nottingham, **Paul Moonlight** as **Client Investment Specialist**, and **Robert Kitchen** has joined as **Chief Executive**.
- **C Hoare and Co** has appointed **Alex Bennett** as a **Senior Relationship Manager** for the South West of England.
- **Canaccord Wealth** has appointed **Gary Steel** as a **Senior Wealth Planner**. Formerly, Gary was Divisional Director at RBC Brewin Dolphin.
- **Cazenove Capital** has appointed **Hugo Ure** as a **Portfolio Director** in its Charities team. Hugo joins from Troy Asset Management.
- **CFM Indosuez** has appointed **Bénédicte Chrétien** as **Chief Executive**. Formerly, Bénédicte was Group Head of Human Resources at Credit Agricole SA.

- **Charles Stanley** has appointed **Paul Measures** as **Head of Intermediary Sales and Strategic Partnerships (North)**. Previously, Paul led intermediary sales at Legal & General Asset Management.
 - **Charles Stanley** and **Raymond James Wealth Management** has named **Kim Jenson** as **Interim Chief Executive**.
 - **Close Brothers Group's** Chief Executive, **Adrian Sainsbury**, has **left** the firm.
 - **Cité Gestion** has appointed **John Plassard** as **Partner**. Additionally, **Alberto Cervantes**, **Matija Jankovic**, **José Prieto**, and **Claude Salvador** have been named **Partners**.
 - **Citi** has appointed **Ron Meraz** as **Wealth Regional Director of California / Nevada**. Ron joins from Merrill Lynch.
 - **Citi Private Bank** has appointed **Hoo Peng Han** as **Director of its Global Family Office Group** in Asia, **Jonathan Leach** as **Head of the UK and Jersey**, and **Chris Biotti** as **Head of North America**. Additionally, UK Head of Citi Private Bank, **Jeremy Knowland**, is **leaving** the firm.
 - **Citi Wealth** has appointed **Marc Turansky** as **Head of Investment Advisory Programmes** within the investment management solutions team, **Russell Budnick** as **Global Head of Capital Markets**, **Patty Sachs** as **Head of Wealth Marketing**, and **Betsy Bickar** as **Head of Art Advisory**. Additionally, Chief Investment Strategist and Chief Economist, **Steven Wieting**, has **left** the firm.
 - **Clifton Wealth Partnership Limited** has appointed **Tom Stansbridge** as **Merger and Acquisitions Execution Manager** from Ascot Lloyd where he was an M&A Manager.
 - **Coutts'** Head of Private Client and Commercial, **Camilla Stowell**, is **leaving** the firm. In addition, Coutts has appointed **Patrice McDonald** and **Jakob Stott** as **Non-Executive Directors**.
 - **Danske Bank** has promoted **Ian Russell** from Head of Homebuying to **Head of Private Banking in Northern Ireland**.
 - **Deutsche Bank** has appointed **Frederick Fong** as **Head of North Asia** and **Alain Bernasconi** as **Chief Operating Officer Emerging Markets, Private Bank**, whilst APAC Chief Investment Officer of Deutsche Bank Private Bank, **Stefanie Holtze-Jen**, **departs**.
- Additionally, **Lionel Dormann** has joined as **Managing Director and Head of Private Bank Coverage Luxembourg and France**, and **David Carrera de Manuel** has joined as **Head of Markets Investment Team Luxembourg**.
- **Edmond de Rothschild** has appointed **Eric de Tessières** as **Group Chief Sustainability Officer**. Formerly, Eric Chief Operating Officer of the Sustainability Center and Head of Solidarity Investments at BNP Paribas Asset Management.
 - **EFG** has named **Elaine Lim** as **Market Head for its Singapore Branch**. Additionally, EFG International has appointed **Thiago Favery**, **Raphael Pinheiro**, **Fernando Olea**, and **Felipe Sebe** as **Senior Vice Presidents, Client Relationship Officers** in Miami. Furthermore, **Rajiv Gaglani** has joined as **Head of UK Wealth Planning**.
 - **EFG Middle East** has appointed **Soha Nashaat** as **Executive Chair** in Dubai.
 - **Enness Global** has appointed **Mariel Marette** as **Head of the Americas**.
 - **Evelyn Partners** has named **Bahador Mahvelati** as **Chief Operations Officer** and a member of the group executive committee, **David Little** as a **Financial Planning Partner** in the firm's Glasgow office, and **Alex Gersh** as **Chief Financial Officer and Executive Director**. Additionally, Evelyn Partners has appointed **Mark Carter** as **Director in Financial Planning** in their Leeds office, **Ross Bone** as **Associate Financial Planner** in their Newcastle office, and **Gail Carr** to the **Investment Management** team in Newcastle. Furthermore, **Gabriela Turner** has joined as a **Director** to its London Financial Planning team, and **Sean Hagerty** has been named as an **Independent Non-Executive Director**. Finally, **Susan Miller-Jones** has been appointed **Chief People Officer**, and **Catherine Kirchmann** has joined as **Partner, Investment Management**.
 - **Findlay Park Partners** has promoted **Rose Vangerven** from Partner to **Chief Executive**.
 - **FNZ** has appointed **James Dunne** as **Managing Director of Client Management and Business Development**. Formerly, James was Head of Wealth Management and Insurance at Santander.
 - **GAM Investments** has appointed **Tom O'Hara**, **Jamie Ross**, and **David Barker** as a new **European Equities Team**. Additionally, **Albert Saporta** has been named **Group Chief Executive**.

- **GSB** has promoted **Stuart Ritchie** from Director, Wealth Advice to **Head of Wealth**, and **Yazmin Boden** to **Senior Wealth Manager**.
- **Guernsey Finance** has appointed **Paul Sykes** as **Chairman**.
- **Hampden & Co** has appointed **Julian Wren** as **Banking Director** in its London office. Julian was previously Senior Commercial Banker at Arbuthnot Latham.
- **Hampden Bank** has appointed **Haydn Aird** as **Head of Banking, North and Midlands**. Formerly, Haydn was Area Director for the Wealth Management Business at Handelsbanken.
- **Hargreaves Lansdown** has appointed **Peter Hargreaves**, former Co-Founder, as **Non-Executive Director**, as Chief Executive, **Dan Olley**, steps down.
- **Hottinger & Co** has appointed **Penny Lovell** as **Chief Executive**. Penny was formerly Managing Director, Head of High Net Worth at Citi Private Bank.
- **HSBC** has appointed **Urban Binggeli** as **Global Private Banking Desk Head for Indonesia** and **Benjamin SY Wang** as **Global Private Banking Desk Head for Thailand**. Additionally, **Julian Wentzel** has joined as **Group Chief Sustainability Officer** and **Kanas Chan** has joined as **Head of Global Private Banking, North Asia and Hong Kong**. Furthermore, **Ishan Sarkar** has been named **Head of Wealth and Premier Solutions, Singapore**, with Chairman, **Sir Mark Tucker**, set to **retire** before the end of 2025.
- **HSBC Global Private Banking** has appointed **Mina Chan** as **Desk Head for the Philippines and Japan** and **Kapil Khanna** as **Desk Head for Australia, Japan and International**, whilst Global Head of UHNW, **Caroline Kitidis**, is understood to be **leaving** the firm. Additionally, **Ann Ling** has joined as **Regional Head of Wealth Planning and Advisory, Asia Pacific**.
- **Hurst Point** has appointed **Michael Bishop** as **Managing Director of its Investment Management Division**. Michael was previously Wealth Management Head at WH Ireland.
- **Investec Bank** has promoted **Emily Dawson** from Head of Corporate and Family Office Team to **Head of Private Banking**. Additionally, **Ashley Dye** and **Ryan Lambotte** to **Lead its Financial Intermediaries Teams** in the Crown Dependencies.
- **JM Finn** has appointed **Rorie Evans** as **Relationship Director** within its Charities Team. Previously, Rorie was Head of Charity Clients at Newton Investment Management.
- **JP Morgan Private Bank's** Head of UK, Channel Islands and Ireland, **Oliver Gregson**, has **left** the firm. Additionally, **Robert Fritz**, **Kevin Tompkins**, and **Christie Houlihan** have been appointed as **Head of Executive Advisory**, **Senior Cybersecurity Specialist**, and **Senior Family Office Adviser**, respectively. Furthermore, **Sonia Rechache** has joined as **Vice President and Client Adviser** to its Paris team, and **Wayne Bowers** has joined as **Head of Institutional Investment Solutions, Asia**. Moreover, JP Morgan Private Bank has named **Sofia Sevastidou** as **Associate and Banker**, **Daniel Liu** as **Vice President and Banker** to its China team, **Matteo Cerin** as a **Vice President and Banker** to its Milan team, **Juan Arana** as **Executive Director and Banker**, and **Oscar Carmona** as **Executive Director and Senior Investment Specialist**. Finally, **Chris Peters** has joined as **Banker and Associate** to its Manchester office, **James Pickford** has been named **Vice President and Banker**, and **Marice Brown** has been appointed as **Head of Private Banking Business UK**.
- **Julius Baer** has appointed **Stefan Bollinger** as **Chief Executive**. Additionally, **Gareth Johnson** has joined as **Head of Managed Portfolio Service**, and **Luigi Vignola** and **Rajesh Manwani** have been named **Co-Heads of the new Global Products and Solutions Unit**, whilst Head of Structured Products Sales for External Asset Managers and Banks, **Shanil Stephan Bentotage**, and Managing Director in the Middle East, **Yahya Ismail**, depart. Furthermore, **Antonia Murga** has joined as **Market Head – Latin America**, and **Shui Wei Ho** and **Vi Sun Yang** have been named **Market Heads South East Asia**.
- **Kingswood Holdings** has promoted **Peter Coleman** from Interim Chief Executive to **Chief Executive**.
- **LGT Wealth Management's** Head of Private Client Services, **Robert Holt**, has **left**. Additionally, **Walter Giger** has been appointed as **Chief Executive** of LGT Financial Services, and **Chris Golding** has joined as **Investment Manager** in its Jersey office.
- **Lincoln Private Investment Office** has appointed **Stuart Moss** as a **Wealth Planner**, and **Louisa Carruthers** as a **Senior Portfolio Manager**.
- **Lioner International** has appointed **Andy Leung** as **Managing Director** in the consultancy team. Formerly, Andy was Head of Wealth Planning at HSBC Private Banking.

- **Maseco Private Wealth** has promoted **Kyle McClellan, Damian Barry, Patrick Bowen, Marc Cane, Ollie Cutting, Stephen Johnson** and **Cormac Naughten** to **Partners**.
- **Mattioli Woods** has appointed **Peter Mann** as **Non-Executive Chairman**.
- **Mirabaud & Cie** has appointed **David Smith** as **Director and Relationship Manager**. David was previously Relationship Manager at RBC Wealth Management.
- **Moneycorp** has appointed **Richard Thomas MBE** as **Global Head of Private Clients**. Richard was previously Head of the UK Region and Chief Executive of EFG Private Bank.
- **Moonfare** has appointed **Heike Hövekamp** as **Chief Legal and Compliance Officer** and a member of the executive committee. Heike was previously Head of Compliance at Société Générale.
- **NatWest Group** has appointed **Jan-Marc Fergg** as **Managing Director, Investment Products and Solutions**. Formerly, Jan-Marc was Global Head of Managed Solutions and ESG at HSBC Global Private Banking and Wealth & Premier Solutions.
- **Nucleus** has appointed **Louis Petherick**, former CRO of Brooks Macdonald, as **Group Chief Risk Officer**, joining at the beginning of August.
- **Oakglen Wealth** has promoted **Myles Renouf** to **Senior Investment Manager** and **Tara Le Feuvre** to **Investment Manager** in its Jersey office. Additionally, **Jack Harris** has joined as **Investment Manager**, and **Charlotte Larbaestier** has been named **Head of Compliance** for its Jersey office.
- **Oddo BHF** has appointed **Thomas Burri** as **Head of Private Wealth Management Switzerland**.
- **Peakhouse** has appointed **Berry Wong** as **Group Chief Executive**. Formerly, Berry was Chief Executive for Asia Pacific at Charles Monet Associates.
- **Peregrine & Black** has appointed **Ian Marsden** as an **Investment Manager**, joining from Oberon Investments where he was an Investment Manager.
- **Pictet Wealth Management** has appointed **Annick Crisford** as **Managing Director**. Annick was previously Director, Client Adviser at Rothschild and Co Wealth Management.
- **PKB** has appointed **Davide Castrini** as **Regional Market Head DACH**, and **Jürg Ragaz** and **Nicolas Garsk** as **Relationship Managers**.
- **PortfolioMetrix** has appointed **Rob Starkey** as a **Portfolio Manager**. Rob was formerly a Portfolio Manager at Schroders Investment Solutions.
- **Private Client Bank AG** has appointed **Philipp Wehle** as **Deputy Chief Executive and Partner**. Philipp has joined from Credit Suisse where he was Chief Executive of Wealth Management.
- **Progeny** has promoted **Tom Wood** from Chief Financial Officer to **Chief Executive**.
- **Ptarmigan Capital** has appointed **Victoria Moffatt** as **Compliance and Operations Officer**, and **George Palmer** as **Non-Executive Director**.
- **Puma Investments** has appointed **Jeremy Roberts** as **Managing Director**. Formerly, Jeremy was Head of Global Distribution (ex UK) at Liontrust.
- **Quilter Cheviot Europe** has appointed **Morgan Whelan** as a **Relationship and Investment Manager**. Formerly, Morgan was a Manager at Bank of Ireland. Additionally, **Alan McIntosh** has rejoined as **Chief Investment Officer**.
- **Quilter Investors** has appointed **Sophie Outhwaite** as a **Senior Manager Research Analyst** and **Cat McNally** as a **Tax and Trust Specialist** in its technical team.
- **Quilter Cheviot** has hired **Nicola Toyer** as **Director** within its charities team, **Gabriel Ramsey** as **Head of Distribution for Ireland**, and **Peter Gorogh** as **Head of Proposition**. Additionally, **Tim Armitage** has joined as **Investment Strategist**, and **Phil Ross** has joined as **Equity Research Analyst**, as Chief Executive, **Andrew McGlone**, departs.
- **Quilvest** has appointed **Marc Voser** as **Chief Investment Officer of Private and Alternative Markets** and **Lucas Bloch** as **Chief Investment Officer of Public Markets**.
- **Quintet Private Bank** has appointed **Hugo Bänziger** as **Chair** of its Board of Directors.
- **Rathbones** has appointed **Camilla Stowell** as **Chief Executive of Wealth** and **Marcus Stewart** as an **Investment Director** in its Newcastle Upon Tyne branch. Additionally, Head of Financial Planning and Advisory Services **Emma Watson** and Chief Operating Officer **Emma Renals** have left the firm. Furthermore, Rathbones has named **Abigail Sater** as **Head of Distribution Strategy**, **James Crossley** as **Head of Asset Management Distribution**, **Ella Hugh** as **Director, Propositions and Service Experience**,

Tessa Curtis as **Director Corporate Communications and Affairs**, and **Rachael Ford** as **Head of Brand and Digital Services**. Finally, **Gemma Gooch** has been named **Head of Charities Distribution** and Group Chief Executive, **Paul Stockton**, will retire at the end of September.

- **RBC Brewin Dolphin's** Managing Director of Wealth Management, **Charles Ferry**, has left the firm, with **David Seaton** and **Emily Waterworth** being named **Head of Birmingham Office** and **Head of Belfast Office**, respectively.
- **RBC Wealth Management Asia** has appointed **Angie Chow** as **Executive Director**, **Becky Chu** as **Managing Director**, **Erica Cheung** as **Executive Director**, **Grace Yu** as **Managing Director**, **Ingrid Lau** as **Managing Director**, and **Roger Kiu** as **Executive Director**. Additionally, **Kamran Azim**, has been promoted from COO to **Head of Private Banking, Singapore**.
- **Redmayne Bentley** has appointed **Nemone Wynn-Evans** as a **Non-Executive Director** and **Ian Cordwell** as **Independent Chair**.
- **Rothschild & Co Wealth Management** has appointed **Edward Binks** as **Director** in their Leeds team, **Tom Fleming** as **Assistant Director** in their Leeds office, and **Jessica Pearson** as **Assistant Director** in their Manchester office. Additionally, **José Luis Muñoz** has joined as a **Client Adviser** in Madrid, and **Rami Saad** has joined as a **Client Adviser (Director)** in Dubai.
- **Ruffer Investment Company's** Senior Portfolio Manager and Partner, **Duncan MacInnes**, and **Steve Russell** have left the firm.
- **Santander Wealth Management's** Head of Wealth Management and Insurance, **James Dunne**, has left the firm.
- **Saranac Partners** has appointed **Peter Charrington** as a **Non-Executive Director**. Formerly, Peter was Chief Executive of Citi Private Bank. Additionally, **Catherine Burr** has joined as **Client Adviser** from Senior Client Adviser at Umbra Capital Partners.
- **SCB Julius Baer** has promoted **Adrian Mazenauer** from Deputy Chief Executive and Head of Wealth Management Thailand to **Chief Executive**.
- **Schroders** has appointed **Oliver Gregson** as **Chief Executive of Wealth Management**, and **Tim McCann** as **Chief Financial Officer and Chief Operating Officer**, whilst Head of Operations, **Mark Baker**, has retired.

- **Sparrows Capital** has appointed **James Denton** as a **Business Development Manager**. Formerly, James was a Business Development Manager at Foresight Group.
- **St James Place** has appointed **Robert Sanders** as **Chief Client Officer**, **James Rainbow** as **CEO**, and **Helen Beck** and **Penny James** as **Independent Non-Executive Directors**, meanwhile Divisional Director, Private Clients, **Paul Emery**, is leaving the firm.
- **Standard Chartered** has appointed **Khoo Kian Jin** as **Head of Private Markets – Southeast Asia and South Asia**, and **Scott Chang** as **Head of Philanthropy, Asia, Wealth Planning & Family Advisory**. Additionally, **Stacey Hsiao** has joined as **Head of Private Markets for Greater China**, and **Yusuf Demiral** has been named **Global Head, Wealth and Retail Banking Data, Analytics and AI**.
- **Standard Chartered Global Private Bank** has appointed **Momin Jaffar** as **Managing Director Group Head**, **Hamza Zahid** and **Zein Chaudhry** as **Executive Director, Relationship Managers**, **Ahmed Anabtawi** as **Executive Director – Team Leader**, **Mahmoud Elsgaei** as **Director, Relationship Manager**, **Aladsair Scarr** as **Executive Director**, **Samar Zarifeh** as **Director**, and **Hamsah Fadhil** as **Director**.
- **Stonehage Fleming** has appointed **Stuart Parkinson** as **Group Chief Executive** and **Sally Fernee** as **Group Head of its Investment Management Operating Function**. Additionally, **Nick Burchett** has joined as **Fund Manager** and **Alasdair McLaren** has been named **Director** in its family office division in Guernsey. Furthermore, **Bev Stewart** has been appointed as **Head of Family Officer, Jersey** and **Lucy Tilley** has joined as **Chief Financial Officer**.
- **Svenska Handelsbanken** has appointed **Mårten Bjurman** as **Chief Financial Officer**.
- **The Family Office** has appointed **Gabriel Aractingi** as **Chief Executive Officer**. Previously, Gabriel was Managing Partner and Head of Middle East and Turkey at Syz Group.
- **The Private Office** has promoted **Abigail Banks** from Senior Financial Adviser to **Partner**.
- **Titan Private Wealth** has appointed **Scott Hamilton** as **Head of Sales**. Scott was previously Business Development Manager for the North at Succession Wealth. Additionally, Titan Wealth has hired **Mike Fogden** as **Chief Marketing Officer**.

- **Tribe Impact Capital** has appointed **Rhodri Mason** as **Chief Executive**. Rhodri was previously Chief Strategy and Product Officer of Legal and General's Asset Management division.
- **TrinityBridge**, formerly Close Brothers Asset Management, has appointed **Andrew Knight** as **Client Relationship Director for Scotland**, whilst Chief Executive, **Eddy Reynolds**, will be **stepping down** from his role in September.
- **Tyndall Investment Management** has appointed **Lucie Meagher** as an **Investment Director** within its private client practice. Lucie joins from Ruffer where she was an investment director.
- **UBP** has appointed **Jamian Lai** as **Market Head for the Philippines**. Jamian was previously Venture Partner and Head of Investor Relations at Headline Asia. Additionally, **Bertrand Binggeli** has been promoted to **Head of Wealth Estate Planning and Family Wealth Solutions**.
- **UBS** has appointed **Michel Frey** as **UK High Net Worth Head**, as Global Co-Head of Family Advisory, **Thomas Ang**, **departs** the firm. Additionally, UBS Global Wealth Management has appointed **Bradley Russell** as **Head of Manchester and the North West**.
- **Vermeer Partners** has appointed **Simon King** as **Chief Executive**. Simon will hold the role alongside his current Chief Investment Officer position.
- **VidaCaixa** has appointed **Gonzalo Gortázar** as **Non-Executive Chairman**. Gonzalo is currently Chief Executive of Caixabank.
- **W1M's** Chair, **David Rosier**, has **retired**, and they have appointed **Nick Hammond** as **Head of Private Wealth and US Private Wealth**.
- **Wealthify** has appointed **Jessie Kwok** as **Chief Investment Officer**. Jessie was previously Senior Investment Director at Investec Wealth & Investment.
- **Wealthtech Ortec Finance** has appointed **Mark Glover** as **Managing Director – Head of UK Wealth Management**. Formerly, Mark was Global Head of Financial Planning at HSBC.
- **Zuger Kantonalbank** has appointed **Marcus Slöör** as **Head of Wealth Management** and a member of its **Executive Board**. Formerly, Marcus was a Managing Director in Credit Suisse's Wealth Management team.

**All information is obtained from publicly available sources*

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