



VALENTINE THOMAS

— & PARTNERS —

People Moves | Wealth
Management

Q3 2025

People Moves | Wealth Management

Please see below a quarterly 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 Private Client** has appointed **Hajad Barre** as an **Associate Director** in its Financial Planning team. Hajad was previously a Private Banking and Wealth Management Specialist at Coutts.
- **Aberforth Partners** has appointed **Duncan MacInnes** as an **Investment Manager**. Duncan was previously a Senior Fund Manager and Partner at Ruffer.
- **Accenture** has appointed **Chenai Mutuma** as **Wealth Management Advisory Lead**. Chanai joins from EY's Wealth and Asset Management Division.
- **AFH Wealth Management** has appointed **Iain Rayner** as **Chief Commercial Officer**. Iain was previously Chief Operating Officer at St James Place.
- **Amina** has appointed **Michael Benz** as **Head of APAC**. Michael was most recently Global Private Banking Head of Standard Chartered.
- **Arbra Partners** has appointed **Laurent Mazens** as **Chief Executive** of its Geneva business. Formerly, Laurent was Chief Executive of Stanhope Capital (Switzerland).
- **Arbuthnot Latham & Co** has appointed **Charlotte Crosswell OBE** as an **Independent Non-Executive Director**.
- **Ascot Lloyd Investment Management's** Chief Investment Officer, **Graham Bentley**, has **retired**. Meanwhile, **Eden Scrivenger** has joined as **Chief Technology and Operations Officer** and **Ben Waterhouse** has been named **Chief Client Officer**, effective January 2026.
- **Bain & Company** has appointed **Marc Van de Walle** as an **External Adviser**. Formerly, Marc was Global Head of Wealth Management at Standard Chartered.
- **Bank Aston** has appointed **Claire Whittet** and **Roy McGregor** as its first **Non-Executive Directors**.
- **Bank J Safra Sarasin** has appointed **Jennifer Springett** as **Head of UK Wealth Planning**. Formerly, Jennifer was UK Head of Wealth Planning at Lombard Odier.
- **Barclays** has appointed Chief Executive of Private Bank and Wealth Management, **Sasha Wiggins**, as **Chair** of the UK's new retail investment campaign.
- **Barclays Private Bank** has appointed **Gabriel Schofield** as **Chief Information Officer**. Previously, Gabriel was CIO for Wealth and Asset Management at Charles Schwab. Additionally, **Nick May** has been promoted from Global Head of the Fiduciaries Business to **Head of Crown Dependencies**.
- **Bergos** has appointed **Peter Schmid** as **Chairman of its Board of Directors, succeeding Christoph Kutscher**. Peter was previously Chief Executive of Merrill Lynch Bank (Suisse).
- **Bowmore Wealth Group** has appointed **Debbie Mahanta** as **Private Client Director**. Formerly, Debbie was a Private Client Consultant at St James's Place.
- **Brooks Financial's** Chief Executive, **Mike Holden**, has **retired** from the firm.
- **Brown Shipley** has appointed **Katrina Johnson** as **Head of its North Region**. Katrina was formerly Regional Director, North England, covering Manchester, Leeds and Newcastle at Barclays Wealth Management.
- **Canaccord Wealth's** Head of ESG Portfolio Management, **Patrick Thomas**, is **leaving** the firm.
- **Cauvery Wealth**, a new venture of Simon Blowey, former Head of 1762, has appointed **Thomas Lack** as **Chief Financial Officer and Chief Operating Officer**, **Carla Morris** as **Wealth Director**, and **Richard Wyatt** as **Wealth Director**. Additionally, Cauvery Wealth has named **Emily Rowles Nicholson** as **Wealth Director**, **Karen Appleyby** as **Wealth Executive**, and **Michael Ring** as **Paraplanner**.
- **Charles Stanley** has appointed **Celine Legaspi** as **Sustainable Portfolio Lead and Responsible Investment Analyst**, whilst Managing Director of Financial Planning, **Andrew Meigh**, has **left** the firm. Additionally, **Hitesh Mistry** and **Gregory Perdon** have joined as **Investment Managers**.
- **Cité Gestion** has appointed **Lutz Lemke** as **Senior Investment Adviser**. Formerly, Lutz was a Senior Private Banker at Credit Suisse.
- **Citi** has promoted **Lee Lung Nien** from Chairman of Citi Private Bank for South Asia to **Country Officer and Banking Head** for Singapore.

- **Citi Wealth** has appointed **Christine Curtiss** and **Kate Boucher** as **Head of Asset Manager Relationships** and **Global Head of Alternative Investment Sales**, respectively.
- **Citi Wealth** has appointed **JP Coviello** as **Head of Portfolio Strategy and Research**. Formerly, JP was a Portfolio Manager and Global Macro Analyst at ExodusPoint Capital Management.
- **Coutts** has appointed **James Todd** as **Managing Director** of the bank's coverage business. Formerly, James was Head of the UK Domestic Private Bank at JP Morgan. Additionally, **Dame Anne Richards** has been named as successor to Lord Remnant as **Chair**.
- **Deutsche Bank Private Bank UK** has appointed **Jaryd Selinger** and **Freddie Lindesay** as **Relationship Managers**, and **Vitita Theeraporn** as **Director** in its Thailand team. Additionally, **Ravi Manot** and **Naushad Khan** have joined as **Managing Director** and **Director**, respectively, to its Global South Asia and Africa team. Furthermore, **Jacky Tang** has been named as **Chief Investment Officer for Emerging Markets**.
- **EFG** has promoted **Luis Ferreira** from Head of Investment Strategy Group at EFG Capital to **Chief Investment Officer for the Americas and Deputy Chief Executive of the Registered Investment Advisor Miami**. Additionally, **Oliver Balmelli** has relocated to London to take up the role **Business Head of Asia-Pacific, UK**.
- **Evelyn Partners** has appointed **Catherine Kirchmann** as **Partner, Investment Management**, **Philip Lewis** as **Head of Financial Planning Advice**, and **Alex Tait** to its **Financial Planning Team** at its Newcastle Office.
- **EY** has promoted **Urs Palmieri** from Partner to its new **Wealth and Asset Management Sector Leader in Switzerland**. Formerly, Urs was
- **Fairstone Group's** Founder and Chief Executive, **Lee Hartley**, is moving into the role of **Deputy Chair**. Additionally, former C Hoare & Co Chief Executive, **Steven Cooper**, has joined as **Chief Executive**.
- **Finli** has appointed **Calum Brewster** as **Chief Commercial Officer**. Calum was most recently Chief Executive of Brown Shipley.
- **GAM Investments** has appointed **Karim Carmoun** as **Managing Director** to lead its activities across France, Benelux and Monaco, reporting to **Tim Rainsford** who is re-joining the firm as **Group Chief Distribution Officer**.
- **GBST** has appointed **Steve Knight** as **Head of Relationship Management**. Formerly, Steve was Director, Head of EMEA Client Account and Service Management at SS&C Global Investor & Distribution Solutions.
- **Goldman Sachs** has appointed **George Rolls** to its **Private Wealth Management Division** working with UHNWI, family offices, charities and endowments in the UK and globally.
- **Hargreaves Lansdown** has promoted **Emma Wall** from Head of Platform Investments to **Chief Investment Strategist**.
- **Heritage Holdings** has appointed **Jim Barrett** as **Senior Partner**. Previously, Jim was Vice President at Julius Baer.
- **HSBC Global Private Bank** has appointed **Joanne Ng** as **Desk Head for the Singapore Team**, **Tim Morse** as **Senior Business Development Manager**, and **Tom Kinnear** as **Relationship Manager**. Additionally, **Edmund Lo** has joined as **Regional Head of Investment Counsellors for Asia Pacific**.
- **HSBC** has promoted **Sami Abouzahr** from Head of Wealth and Premier Solutions, Hong Kong, to **Global Head of Investments and Managed Solutions, Wealth and Premier Solutions**. Additionally, **Benoit Douchin** has joined as **Chief Operating Officer for Global Private Banking, Asia Pacific**, and **Victor Matarranz** has been named **Head of International Wealth and Premier Banking, Americas and Europe**.
- **IPGL** has appointed **Simon Brazier** as **Chief Executive Officer**. Formerly, Simon was Co-Head of Quality Investing at Ninety One.
- **J Stern & Co** has appointed **Andreas Krebs** as **Head of Germany**. Previously, Andreas was Managing Director at Mandarin Gestion.
- **JM Finn** has appointed **Mark Burnett** and **Liam Shelton** as **Wealth Managers** to establish a new office in Cheltenham, and **Andrew Theban** as an **Investment Manager** in its Bristol office. Additionally, **Tom Cheesman** has joined as an **Investment Manager**.
- **Johnston Carmichael Wealth** has appointed **Robbie Chisholm** as **Financial Planner**. Robbie was most recently a Financial Planner at Tweed Wealth Management.
- **JP Morgan Private Bank** has appointed **David Frame** as **Global Chief Executive**, **Alice Joyce** as **Associate and Banker**, and **Simone Grueninger** as an **Executive**

Director and Portfolio Manager. Additionally, **Philippe Masson** has joined as **Vice President and Lending Specialist** and **Tom Read** has joined as **Vice President and Private Banker**. Furthermore, **Rachel Malik** has been appointed as **Vice President and Banker** and **Marc Breidy** as a **Banker**.

- **LGT Wealth Management** has appointed **Kirsty Thomson** as **Wealth Manager** in its Edinburgh office, whilst Co-Head of Financial Planning, **Graham Thomas**, departs the firm. Additionally, **Vimal Parmar** has joined as **Wealth Planner** from Aberdeen where he was a Financial Planning Director.
- **Liechtensteinische Landesbank AG** has promoted **Christoph Reiche** from Deputy Group Chief Executive to **Group Chief Executive and Chairman of the Group Executive Board**.
- **Lincoln Private Investment Office** has appointed **Holly Hart** as **Assistant Wealth Planner**, **Alex Richman** as **Client Analyst**, and **Fenella Barling** as **Operations Team Assistant**.
- **Lombard Odier** has appointed **Thomas Morley** as **Chief Operating Officer**, **Sophie Dworetzky** as **UK Head of Wealth Planning**, and **Alfred Low** as **Hong Kong Chief Executive and Head of North Asia Markets** for its private clients franchise. Additionally, **Pei Pei Chern** has joined as **Senior Relationship Manager in Singapore**, and **Lucien Jeannin** has been named **Head of Strategy and Business Development in Asia**.
- **Mirabaud & Cie Europe SA** has appointed **Émilie Serrurier-Hoël** as **Chief Executive**. Formerly Émilie was Director of the Chief Executive's Office at Banque Internationale à Luxembourg. Additionally, **Ricardo Castillo** has joined as **Head of Investments** from RCF Capital, where he was Head of Investments.
- **Moneyfarm** has appointed **Nitesh Palana** as **Chief Risk and Compliance Officer**. Nitesh was previously Director of Risk and Compliance and Head of Government Affairs at Thought Machine.
- **Moonfare** has appointed **Karran Kent** as **Senior Associate**. Formerly, Karran was Senior Associate in Secondaries at Houlihan Lokey. Additionally, **Sanjay Gupta** has been promoted from Chief Investment Officer to **US Chief Executive and Chief Investment Officer of Proprietary Products**.
- **Multrees Investor Services** has appointed **Matt Bain** and **Ella Whitley** to its **Client Development Team**.
- **NatWest Group** has appointed **Betsy Munro** as **Chief Financial Officer**, and **Dalia Hammoudi** as **Managing Director, Coutts International Markets**. Additionally, **Jan-Marc Fergg** has joined to **lead the investment products and solutions business**.
- **Nedbank Private Wealth** has appointed **Andrew Corlett** as **Chair of its Board**. Andrew joined Nedbank Private Wealth in 2020 as a Non-Executive Director.
- **Oberon Investments'** Head of Investment Management, **Marcus Holden-Craufurd**, has **left** the firm. Additionally, **Peter Martin** has joined to **launch a new Global Equities Fund** and **Jake Bambridge** has been named **Funds Operations Manager**. **Barry Smead** has also joined as **Head of Investment Management**.
- **Openwork Partnership** has appointed **Rob Barker** as **Chief Executive**. Formerly, Rob was Head of Insurance, Wealth and Asset Management EEA for Alvarez & Marsal.
- **Ortec Finance** has appointed **John O'Driscoll** as **Managing Director of OPAL Financial and Wealth Planning**. Formerly, John was Divisional Director of St James' Place Business Development and Advice Team.
- **Pictet Wealth Management** has appointed **Nina Hoas** as **Senior Philanthropy Strategist**. Formerly, Nina was Head of LGT Bank's Philanthropy Advisory Offering.
- **Progeny Group** has appointed **Andrea Hodgson** and **David Baker** to its board as **Non-Executive Directors**.
- **Quilter Cheviot** has appointed **Yumna Yusuf** as **Responsible Investment Analyst**. Formerly, Yumna was Climate Engagement Associate at Schroders. Additionally, **John Goddard** has joined as **Chief Executive** from Vistula International where he was Managing Director.
- **Quintet Private Bank** has appointed **Edwin Lardot** as a **Client Adviser**. Formerly, Edwin was Head of Tax Services and Warrants desk at Banque Internationale à Luxembourg. Additionally, **Mitchel Lenson**, **Antonio Lorenzo**, and **Carolina Minio-Paluello** have been appointed to the **Board of Directors**.
- **Rathbones Group** has appointed **Jonathan Sorrell** as **Group Chief Executive**, joining from Capstone Investment Advisors where he was President.
- **Rathbones'** Group Chief Executive, **Paul Stockton**, has **left** the firm.

- **RBC** has promoted **Bee Leng Phua** from Head of APAC Business Transformation Group and Finance Change Management to **Chief Operating Officer, Wealth Management Asia** as of November 2025.
- **RBC Brewin Dolphin** has promoted **Zoe Gillespie** to **Head of the Glasgow Office**, with **Jack Benton** and **Gordon Parsons-Wallace** joining as **Wealth Managers** in the Glasgow office. Additionally, **Joe Smith** has joined as **Cohort Head** in its London office, with **Jamie Regan** and **Justine Lobel** joining the London office as **Directors**.
- **RBC Wealth Management** has appointed **Christopher Chin** and **Low Keow Teck** as **Executive Directors**, **Raymond Heng** and **Wilson Khoo** as **Managing Directors**, and in Hong Kong, **Flora Kam**, **Ince Pan** and **Mark Chan** have all joined as **Executive Directors**.
- **Rothschild & Co** has appointed **Peter Hindle** as **Head of Client Teams** and **Chris Oliver** as **Head of Client Strategy and Execution**.
- **S64** has appointed **Fabrizio Mazzucato** as **Head of Italy Coverage**. Formerly, Fabrizio was Sales Director for Italy at Russell Investments.
- **Sarasin & Partners** has promoted **Tom Vernon** to **Head of its Private Clients Team**.
- **SimCorp** has appointed **Peter Sanderson** as **Chief Executive**. Formerly, Peter was Chief Executive at GAM Investments.
- **Six Degrees** has appointed **Harry Chetwode** as a **Client Adviser**. Formerly, Harry was Associate Director at RBC Wealth Management.
- **Skybound Wealth** has appointed **Jamie Proctor** as **Private Wealth Adviser**. Formerly, Jamie was a Financial Planner at Xentum Financial Planning.
- **Snowball Investment Management's** Chief Executive, **Daniela Barone Soares**, has **left** her role.
- **Sparrows Capital** has promoted **Phillip Young** from Investment Analyst to **Deputy Chief Investment Officer**.
- **St James's Place** has promoted **John Elkovich** from Head of Partnership to **Chief Executive** of the firm's Singapore office.
- **Stonehage Fleming** has promoted **Darryn Faulds**, **Ryno Visagie** and **Luan Fouche** (Johannesburg), **Keri Breadner** and **Tessa Burrows** (Isle of Man), **Leanne Stuart** (Jersey) and **Udayesing Bheergoonath** (Mauritius) to **Director** in its family office division. In its

Investment Management division, **Archie Burt**, **Mark Leshnick**, **Miki Caves** and **Philip Richardson** (London) and **Brad Fainsinger** (Johannesburg) have been promoted to **Director**. Additionally, **Cecile Schlub** (Monaco), **Eugene Johannes** (Cape Town), **Michelle Weipers** (Isle of Man), and **Stefano Marzo** (Neuchatel) have been promoted to **Director**. Furthermore, current Group Chief Financial Officer, **Lucy Tilley**, has joined its **Board of Directors**.

- **Syz Bank** has appointed **James Morton**, **Patrick Robadey**, and **Alexander Metzger** as **UK Lead Senior Banker**, **External Asset Managers Senior Relationship Manager**, and **Digital Assets Lead**, respectively.
- **Tatton Investment Management** has appointed **Perry Beard** and **Jacob Cullen** from AllianceBernstein to its growing **Investment Specialist Team**.
- **UBS Global Wealth Management** has appointed **Tina Bee** and **Alecia Ibbotson** as **Executive Director**, **Client Advisor** and **Junior Client Advisor**, respectively, to its Jersey office, and **Stephanie Khalef-Wassmer** as **Client Adviser** in London. Additionally, **Alex Clayton** has joined as a **Client Adviser** in the London High Net Worth team, and **David Stone** has joined as a **Client Adviser**. Furthermore, **Andrew Sloan** has been named **Client Adviser** in Edinburgh, and **Francois-Oliver Mercier** has joined as **Head of Global Family and Institution Wealth (GFIW) UK**.
- **Utmost Wealth Solutions** has appointed **Mark Christal** as **Head of Asia** and **Ben Munday** as **Chief Executive of International Isle of Man, Singapore Branch**.
- **UWealth** has appointed **Andrea Stefanowicz Sabrier** as **Chief Executive**. Formerly, Andrea was Director at Julius Baer.
- **Van Lanschot Kempen's** Chief Operating Officer, **Arjan Huisman**, will **step down** from his role as a member of the management board.
- **Vontobel** has appointed **Annette Nanzer** as **Head of Human Resources**. Previously, Annette was Head of Human Resources at Zuger Kantonalbank.
- **VP Bank** has appointed **Roland Kläy** as **Chief Financial Officer** and a member of the Group Executive Management. Roland was previously co-founder and Chief Financial and Risk Officer of Radicant Bank AG. Additionally, **Michel Hofstetter** has been promoted from Head of Intermediaries

International and Executive Director to **Head of Private Banking and Intermediaries Singapore**.

- **W1M Wealth Management** has appointed **Keith Sheehan** as **Wealth Manager** in its Private Wealth Team, and **Thulasi Muraleetharan** as **Portfolio Manager**. Additionally, **Jake Lewis** has joined as **Business Development Manager for Adviser Solutions**.
- **Weatherbys Private Bank** has appointed **Nick Manduca** as **Team Head and Senior Private Banker** and **Laurence Jackson** as a **Private Banker** in its Manchester Office. Additionally, **Edmund Harvey-Jamieson** has joined as **Senior Private Banker** in its Edinburgh office, and **Maria Kahn** has been named **Director of Product and Services**. Furthermore, **Michael Juby** has been appointed as **Senior Private Banker**.

**All information is obtained from publicly available sources*

The Team

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