



**VALENTINE THOMAS**

— & PARTNERS —

People Moves | Wealth  
Management

Q4 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** has promoted **Darren Fancourt** from Head of Trading and Operational Change to **Head of Operations**.
- **Arbuthnot Latham** has appointed **Victoria Gevorkova** as **Fund Research Analyst** within the bank's investment management team, **Greg Ripley-Kinchin** as **Senior Private Banker** in its media team, and **Jack Akister** as **Private Banker** in its media team. Additionally, **Simon New** has joined as **Chief Operating Officer** from FNZ Group where he was Chief Customer Officer.
- **Artorius** has appointed **Andrew Dixon** as **Head of Wealth Planning**. Formerly, Andrew was Head of Wealth Planning at UBP.
- **Ascot Lloyd Investment Management** has appointed **St John Gardner** as **Managing Director**. Formerly, St John was an Investment Director at RBC Brewin Dolphin.
- **Bank Aston** has appointed **Will Davey** as **Chief Financial Officer**. Formerly, Will was Managing Director and Deputy CFO at Credit Suisse AG Parent Bank.
- **Bank of Singapore** has appointed **Claude Andre Harbonn** as **Head of Investment Advisory**. Claude was previously Co-Head of UHNW Solutions Group at UBS Wealth Management.
- **Barclays Private Bank** has promoted **James Arthey, Shamonie Barman, Nick May, James Pitkin, Simon Smith** and **Jaz Walia** as **Managing Directors**.
- **Benchmark Capital** has appointed **Karan Sejjal** as **Head of Wealth Management**. Formerly, Karan led the discretionary fund management team, entrepreneurs team, and regional offices at Cazenove Capital.
- **Blevins Franks** has appointed **James Roberts** as **Chief Executive Officer**. James previously co-founded Partners Wealth Management.
- **BNP Paribas** has promoted **Yusuf Savmaz** from Interim Chief Executive to **Chief Executive Officer** of its Wealth Management division in Switzerland. Additionally, **Fabrice Bagne** has been promoted from Deputy General Director to **Head of Private Banking in France**.
- **BNP Paribas Wealth Management** has appointed **Julia Yeung** as **Managing Director in Hong Kong**. Formerly, Julia was Executive Director of UBS' Wealth Management Division.
- **Bonhôte** has appointed **Frédéric Dommart** as **Chief Operating Officer** and **Claude Suter** as **Chief Client Officer**, following the retirement of Olivier Vollenweider and the departure of Marc Brodard respectively.
- **Brooks Macdonald** has appointed **Andy Robinson** as **Chief People Officer**. Formerly, Andy was Global Head of Human Capital at Alantra.
- **Brown Advisory** has appointed **Freya Marks** as **Strategic Adviser**. Formerly, Freya was a Senior Associate at Taylor Wessing.
- **Brown Shipley** has appointed **Melissa Buray** as **Client Adviser in Birmingham**. Formerly, Melissa was Relationship Manager for Clients in the East Midlands at HSBC Private Banking.
- **Canaccord Wealth** has appointed **Alice Wright** as **Investment Director**. Formerly, Alice was Senior Investment Director at Rathbones.
- **Cazenove Capital** has promoted **Bob Hair** from Regional Head of Scotland to **Head of UK Regions**.
- **Charles Stanley** has promoted **Abbas Owainati** from Head of Asset Allocation to **Head of Portfolio Management and Asset Allocation**.
- **Citi** has appointed **Alexander Azzi, Oliver Geib, Adam Lotz** and **Michael Rundlöf** as **Investment Counsellors**, whilst Global Head of Family office, **Hannes Hofmann**, departs the firm.
- **Citi Private Bank** has promoted **Benjamin Choo, Richard Jiang, Andrew Li** and **Sherlock Lou** to **Managing Directors in Asia**, **Priya Sriskantharajah** to **Managing Director of UK and Global South Asian Market**, and **Luca Vodin** to **Managing Director for Europe**. Additionally, Citi Private Bank has promoted **Ahmad Jamal Eddine** and **Vikram Manik** to **Managing Directors in the Middle East**. Furthermore, **Rafael Pouchucq** has joined as **Senior Vice President, Investment Counsellor** and **Brij Scharmer** has joined as **Banker** in the Africa team. Finally, **Andre Braendli** has been named **Banker** in their Middle East

team and **Boris Schneider** as **Senior Private Banker**, working with Swiss clients.

- **Citi Private Bank Mexico** has appointed **Carlos Rodríguez Aspirichaga** as **Market Executive**. Formerly, Carlos was a Financial Adviser at UBS in Miami.
- **Deutsche Bank** has appointed **Konstadinos Hatzinikolis** as **Head of Private Bank Greece** and **Patrick Schartner** as **Head of Markets Investment Team for Europe International**. Additionally, Deutsche Bank Private Bank has hired **Vivienne Chia** as **Global Head of Private Bank Investment Solutions**. Furthermore, **Filippo Rocchi** has joined as **Head of Investment Management Middle East** and **Piergiorgio Cellerino** has joined as **Relationship Manager** in the Saudi offshore team.
- **EFG Wealth Solutions** has appointed **Mary Chan** as **Chief Executive Officer** in Singapore. Formerly, Mary was Head of Wealth Planning for Southeast Asia at HSBC.
- **EQ Investors** has appointed **Tom Wait** as **Investment Manager** in its discretionary fund management division. Formerly, Tom was an Investment Manager in RBC Brewin Dolphin's Private Client team.
- **Evelyn Partners'** Chief Marketing and Commercial Officer, **Andrew Middleton**, is **leaving** the firm. Additionally, **Sukaina Karim-Hussein** has joined as **Director, Financial Planning**, and **Hector Millar** has joined as **Associate Director, Chartered Financial Planner**. Furthermore, **Chris Dean** has been appointed to its **Edinburgh Financial Planning Team** and **Victoria Gammon** has joined as a **Partner** in its Financial Planning Team.
- **Firenze** has appointed **Paul Emery** as **Head of Corporate Finance**. Formerly, Paul was Divisional Director at St James's Place.
- **Five Wealth** has appointed **Glenn Urquhart** as **Chief Operating Officer**. Formerly, Glenn was Head of Operational Service Delivery at Verso Wealth Management.
- **Hampden Bank** has appointed **Greig Townsend** and **Angela Dowd** as **Chief Banking Officer** and **Chief Operating Officer**, respectively.
- **Hottinger Group** has appointed **Layla Alsahli** as **Director**. Formerly, Layla was a Private Banker at Citi.
- **HSBC Global Private Banking** has appointed **Edy Panggabean** as **Senior Relationship Manager** and **Cluster Head for Indonesia**, **Xilin Yeo** as a **Relationship Manager** in the Indonesia Team, **Kraisit Buakruen** as a **Relationship Manager** based in Singapore, **Relationship Manager** as a **Relationship Manager** in the Greater China Team, **Shobana Vaidhyanathan** as a **Relationship Manager** to HSBC GPB's global India team, and **Sangeet Batra** as a **Relationship Manager** in the global India team in Singapore.
- **HSBC** has appointed **Kevin Hu** as **Head of International Wealth and Premier Banking Taiwan**. Formerly, Kevin was Senior Executive Vice President at Cathay United Bank.
- **HSBC Private Bank** has appointed **Emanuele Vignoli** as **Chief Executive of its Luxembourg Private Bank and Market Head of Continental European Coverage**, alongside his existing role as Chief Executive of HSBC Luxembourg. Additionally, **Unnikrishnan Chowallur** has joined as **Director** from Societe Generale where he was a Director in the International Private Banking Team.
- **Indosuez Wealth Management** has appointed **Phonda Chan**, as **Deputy Chief Executive**, **Carol Chau** as **Team Head**, and **Ivan Chung** and **Sam Wong** as **Relationship Managers**. Additionally, **Eddie Chng** has joined as **Managing Director and Market Leader, China**, and **Aveline Tan** and **Anna Liu** have joined as **Relationship Managers**.
- **Investec Bank** has appointed **Jaime Arévalo** as **Senior Portfolio Manager**. Formerly, Jaime was Multi-Asset Portfolio Manager at Schroders.
- **Isio** has appointed **Gareth Roberts** as **Chief Financial Officer**. Formerly, Gareth was a Finance Director at Howden.
- **JM Finn** has appointed **Samir Shah** as **Senior Research Analyst**. Samir was previously Senior Fund Analyst at Quilter Cheviot. Additionally, **Arabella Henman** has joined as **Relationship Manager** from Vermeer Partners where she was a Business Development Director.
- **JP Morgan Private Bank** has appointed **Edward Sargeant** as a **Banker** and **André Spiewak** as an **Executive Director and Team Lead for Northern Germany**. Additionally, **Giovanni Revedin di San Martino** has joined as **Managing Director and Banker in London**, and **Selim Elgen** has joined as **Managing Director and Market Head for the UAE**. Furthermore, **Wael Charbel** has been named **Executive Director**

and **Banker** and **Chris Wong** has been named a **Vice President and Banker** in its China team.

- **Julius Baer** has appointed **Tim Bailey** as **Senior Relationship Manager**, **Elliot Smith** as **Associate Director in their Manchester office**, and **Joanna Cameron** as **Director** based in Edinburgh. Additionally, **Dah-Eun Chae** has re-joined as **Senior Relationship Manager**. Furthermore, **Marc Blunier** and **Alain Krüger** have joined as **Co-Heads of Market, Switzerland**.
- **LGT Wealth Management's** Chief Executive, **Ben Snee**, is **stepping down**.
- **Liechtensteinische Landesbank AG (LLB)** has promoted **Markus Schifferle** from Head of Group Finance and Risk to **Group Chief Financial Officer**.
- **Lombard Odier** has appointed **Tom Camber** as a **Senior Private Banker** and **David Fournier** as **Head of Private Banking Activities** in French-Speaking Switzerland.
- **Maseco Private Wealth** has promoted **Adrian Edwards** from Chief Operating Officer to **Partner**.
- **Mattioli Woods** has appointed **Scott Stevens** as **Managing Director of Business Development and Marketing** and **Joanna Stocks** as **Senior Investment Manager**, whilst Chief Executive, **Ian Mattioli**, departs the firm.
- **Multrees Investor Services** has promoted **Martyn Johnson** from Chief Transformation Officer to **Chief Operating Officer** and **Carole Lamond** from Chief People Officer to **Chief Culture and Communications Officer**.
- **Nucleus Financial Platforms** has promoted **Mike Regan** from Chief Commercial Officer to **Deputy Chief Executive**.
- **Oberon** has appointed **Andrew Little** as **Head of Exeter Office**, **Chris McNulty** as **Senior Investment Director**, and **Michael Balch** and **Emily Davidson** as **Associate Investment Managers**.
- **PKB** has appointed **Loris Centola** as **Chief Investment Officer**. Formerly, Loris was Co-Head of Asset Management at Belvoir Capital AG.
- **Quanta Group** has appointed **Graeme de Moor** and **Mark Sutton** as **Group Chief Financial Officer** and **Group Chief Risk Officer**, respectively.
- **Quilter Cheviot** has appointed **Colin Monton** as **Head of Client Development – Corporate and**

**Entrepreneur** and **Maria Gardner** as **Investment Director** in its Jersey office.

- **Quintet Private Bank** has appointed **Dr Thomas Heinzl** as **Group Chief Executive**. Formerly, Thomas was Chief Financial Officer and Chief Risk Officer at Vontobel.
- **Rathbones'** Chief Investment Consul, **Chris Hills**, Head of Strategic Partnerships, **Simon Taylor**, and Chief Operating Officer, **Paul Jones**, are **leaving** the firm. Additionally, Rathbones has appointed **Cassandra Williams** as **Chief Risk Officer Designate and Compliance Officer**, **Gillian Van Maaren** as **Chief People Officer**, **Mike Turner** as **Chief Operating Officer**, and **Brad Novak** as **Chief Technology Officer**.
- **Raymond James Investment Services** has appointed **Chris Cahill** and **Ben Camp-Bell** as **Divisional Director** and **Director of Wealth Management Services**, respectively.
- **Raymond James Wealth Management** has appointed **Martina Kay** as **Chief People Officer**. Formerly, Martina was Global HR Director at Legal & General Investment Management.
- **RBC Brewin Dolphin** has appointed **Rupert Gorman** as **Director, Wealth Manager**. Formerly, Rupert was Wealth Manager at LGT Wealth Management.
- **RBC Wealth Management** has appointed **Cherry Wang** and **Jaime Huang** as **Executive Directors**, **Irene Chua** as **Director**, and **Mandy Khew** as **Associate Director**, all based in Singapore. Additionally, **Arda Yan** has joined as **Executive Director** and **David Lam** has joined as **Director**, both based in Hong Kong.
- **Rothschild & Co** has promoted **James Morrell** from Deputy Chief Executive Officer to **Chief Executive Officer** of its UK Wealth Management business. Additionally, **Hanno Roth** and **Dirk Wehmhöner** have been named as **Executive Managers**.
- **Rothschild & Co Wealth Management** has appointed **Ben Gulliford** to **lead its team in the Midlands**. Formerly, Ben was a Director and Leader of Barclays Wealth's West Team. Additionally, **Kaie-Liis Asu** has joined as **Head of Baltics** from LHV Bank where she was Head of Private Banking.
- **Schroders Wealth Management** has appointed **Oliver Gregson** as **Chief Executive Officer**, **Alexander Pronk** as **Chief Executive Officer of Europe and the Middle East**, **Andreas Piepke** as **Group Chief Operating Officer**, **Mark Pickering** as **Global Head of Banking, Lending and Trading**, **Kate Rogers** as **Global Head**

- **of Proposition and Group Collaboration, Steve Davenport** as **Wealth Platform Transformation Programme Manager**, and **Paul Fletcher** as **Global Chief Marketing Officer**.
- **Skybound Wealth** has appointed **Shil Shah** as **Group Head of Tax Planning**. Formerly, Shil was a Private Wealth Advisor at Apollo Private Wealth.
- **Söderberg & Partners Wealth Management** has appointed **Keith Furniss** as **Chief Commercial Officer**. Formerly, Keith was Business Development Director at Wealthtime Group.
- **Sparrows Capital** has appointed **Dan Torbett** as **Business Development Manager**. Formerly, Dan was a Business Development Manager at EBI.
- **St Galler Kantonalbank** has appointed **Peter Guggemoos** as **Head of International Private Banking**. Formerly, Peter was Vice Director at Zürcher Kantonalbank.
- **Standard Chartered Global Private Bank** has appointed **Peter Horng** as **Head of Investment Advisory and Product Advisory, Private Banking for Greater China and North Asia**. Formerly, Peter was Managing Director, Head of Investment Products and Advisory at DBS Bank.
- **Standard Chartered** has appointed **Ares So** as **Head of its mainland China team**. Formerly, Ares was Executive Director and Mainland Market Lead, Private Banking at Bank of China.
- **Stonehage Fleming** has promoted **Mark Swart** from Partner Family Office Division, Jersey to **Head of Family Office Division, Isle of Man**.
- **Titan Wealth** has appointed **Michael Paul** as an **Associate Director**. Formerly, Michael was Head of Equity Fund Research at RBC Brewin Dolphin.
- **Tribe Impact Capital** has appointed **Harry Catchpole** as **Chief Growth Officer**, **Cate Quentin** as **Head of Wealth Management**, and **Christopher Toy** as **Head of Adviser Distribution**. Additionally, **Katharine Samuels** has joined as **Head of UHNWs and Family Offices**.
- **True Potential Wealth Management** has appointed **Stuart Dodson** as **Chief Executive**. Formerly, Stuart was Group Managing Director at Openwork.
- **Tyndall Investment Management** has appointed **Oliver Pile** as **Investment Director** within its private client practice. Formerly, Oliver was Director in Ruffer LLP's private wealth division.
- **UBS Global Wealth Management** has appointed **Amit Kachawaha** as **Client Adviser** in London. Formerly, Amit was Senior Director at DBS Bank.
- **UBS** has appointed **Michelle Bereaux** as **Group Head of Compliance and Operational Risk Control** and **Beatriz Martin** as **Group Chief Operating Officer**, whilst Group Chief Operations and Technology Officer, **Mike Dargan, steps down**.
- **Van Lanschot Kempen** has promoted **Guido van Aubel** from Managing Director, Wholesale and Institutional Clients to **Chief Operating Officer**.
- **Vontobel** has appointed **Dominique Gerster** as **Head of Corporate Communications**. Previously, Dominique was Head of Global Media Relations Wealth Management at Credit Suisse.
- **VP Bank Group** has promoted **Felix Brill** from Chief Investment Officer to **Head of International Locations**.
- **W1M** has appointed **Jenny Quan, Paul Bentley** and **Luke Edy** to its **Private Wealth Team**. Additionally, **Alistair Jackson** and **Poppy Campbell-Lamerton** have joined as **Associate Director** and **Wealth Manager**, respectively, in its Private Wealth and US Private Wealth teams. Furthermore, **Oliver Jones-Davies** has been named as **Director, Portfolio Manager** to its charities team.
- **Weatherbys Private Bank** has appointed **Michelle Duncalf** to **Lead its Manchester team of Bankers**, and **Amber Jenkins** and **Renae Maroney** as **Bankers** in its London office.
- **Wise Group** has appointed **Darren Ng** as **Group Chief Financial Officer**, **Jude Lin** as **Deputy Chief Executive of Wise Private Singapore**, **Pushkin Kapoor** as **Deputy Chief Executive for Wise Private Middle East**, and **Ken Wong** as **Deputy Chief Executive of Wise Prestige Hong Kong**.

*\*All information is obtained from publicly available sources*

# The Team

## Alex Diffey

Partner,  
Head of Wealth Management

36 - 38 Cornhill | London, EC3V 3NG  
tel: +44 (0) 7939 227783  
[adiffey@valentinethomas.com](mailto:adiffey@valentinethomas.com)



## David Harms

Partner,  
Investment Management

36 - 38 Cornhill | London, EC3V 3NG  
tel: +44 (0) 7973 924767  
[dharms@valentinethomas.com](mailto:dharms@valentinethomas.com)



## Basil Reid Thomas

Partner,  
Investment Management

36 - 38 Cornhill | London, EC3V 3NG  
tel: +44 (0) 7970 940397  
[brt@valentinethomas.com](mailto:brt@valentinethomas.com)



## Amanda Floyd

Partner,  
Investment Management

36 - 38 Cornhill | London, EC3V 3NG  
tel: +44 (0) 7495 747189  
[afloyd@valentinethomas.com](mailto:afloyd@valentinethomas.com)



## Georgia Hill

Chief Administrative  
Officer

36 - 38 Cornhill | London, EC3V 3NG  
tel: +44 (0) 7415 728719  
[ghill@valentinethomas.com](mailto:ghill@valentinethomas.com)



## Alice Harris

Researcher,  
Investment Management

36 - 38 Cornhill | London, EC3V 3NG  
tel: +44 (0) 7879 650993  
[aharris@valentinethomas.com](mailto:aharris@valentinethomas.com)



## Celia Cortijo

Consultant,  
Investment Management

36 - 38 Cornhill | London, EC3V 3NG  
tel: +44 (0) 7930 443875  
[ccortijo@valentinethomas.com](mailto:ccortijo@valentinethomas.com)



## Richard Valentine

Advisor

36 - 38 Cornhill | London, EC3V 3NG  
tel: +44 (0) 7979 645520  
[rgv@valentinethomas.com](mailto:rgv@valentinethomas.com)



# VALENTINE THOMAS

— & PARTNERS —

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