



**VALENTINE THOMAS**

— **& PARTNERS** —

People Moves | Wealth  
Management

Q1 2026

# 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 **Ben Kumar** from Head of Equity Strategy to **Head of Strategy for Wealth, Public Policy and Investment**.
- **AITi Tiedemann Global** has appointed **Alex Kershaw** as a **Managing Director**. Formerly, Alex was a Partner at Stanhope Capital.
- **Apollo** has appointed **Diego De Giordi** as **Partner and Head of EMEA**. Formerly, Diego was Group Chief Financial Officer at Standard Chartered.
- **Arbuthnot Latham** has appointed **Henry Taylor** as **Director and Head of Racing**. Previously, Henry was Head of Weatherbys Racing Bank.
- **Ascot Lloyd** has promoted **Felice Rea** from Group Finance Director to **Chief Risk and Controls Officer**.
- **Azets Wealth Management** has appointed **Simon Stygall** as **Chartered Financial Planner and Director**. Formerly, Simon was Chartered Financial Planner at Flying Colours.
- **Azqore** has promoted **Franck Bernay** from Deputy Chief Executive to **Chief Executive Officer**.
- **Bank J Safra Sarasin** has appointed **Dong Chen** as **Chief Investment Officer for Asia**. Previously, Dong was Chief Asia Strategist and Head of Asia Research at Pictet Wealth Management.
- **Bank of Singapore** has appointed **Collins Chin** as **Global Chief Financial Officer**. Formerly, Collins was Head of Investor Relations at OCBC. Additionally, **Eng Chien Chan** joins as **Market Group Head for Greater China** from HSBC Private Bank where he was Market Head for Taiwan and Co-Head for Offshore China.
- **Barclays** has appointed **Jamie Lang** as **Investment Adviser** in its Isle of Man team and **Werner Schlossmacher** as **Chief Operating Officer** for Private Bank Asia. Additionally, Barclays Bank (Suisse) SA has named **John Shipman** as **Chief Executive Officer**.
- **Barclays Private Bank International** has appointed **Alexander Johnstone** as **Team Leader for the Middle East** and **Lama Aboufakhr** as **Head of Middle East Business, UK**. Additionally, **Olivier Franceschelli** has joined as **Chief Executive of its Private Bank** in Monaco, and **Adrish Ghosh** has joined as **Head of Private Bank** for India. Furthermore, **Belal Mohammed Khan** has been named **Head of Family Office Coverage for the UAE**.
- **Blackhorn Wealth Management** has appointed **Andy Yuen** as **Chief Operating Officer**. Previously, Andy was Managing Director and Senior Adviser at Julius Baer.
- **BNP Paribas Wealth Management** has promoted **Dimitri Prot** from Head of Sales for Switzerland to **Head of International Europe**.
- **BNY** has appointed **Brian Riley** as **Global Head of Wealth**. Formerly, Brian led the Western US at Rockefeller Capital Management. Additionally, **Adam Vos** has been promoted from Global Head of Markets to **Global Head of Wealth Solutions**.
- **Bordier & Cie UK** has appointed **Jason Day** as **Head of Fund Research**. Jason was most recently Senior Investment Manager at Aberdeen.
- **Brooks Macdonald's** Co-Chief Investment Officer, **Richard Larnar**, Chief Commercial Officer, **Robin Eggar**, and Chief Technology Officer, **Adam Jones**, are **leaving** the firm, as **Pippa Lyons** joins as **Head of Portfolio Management**. Additionally, **Will Hobbs** has been named **Chief Investment Officer**, subject to regulatory approval.
- **C Hoare & Co** has appointed **Simon Kenyon** as **Chief Executive Officer**, effective June 2026. Previously, Simon was Senior Adviser at Boston Consulting Group.
- **Canaccord Wealth** has appointed **Antony Champion** as **Chief Distribution Officer**. Previously, Antony was Head of Intermediaries at RBC Brewin Dolphin.
- **Capital Financial Markets** has appointed **Emma Tuckett** as **Investment Manager**. Formerly, Emma was an Investment Manager at Killik & Co.
- **Cazenove Capital** has appointed **Lynsey Carson** as **Business Development Director for Scotland and the North**. Additionally, **Matthew Roberts** and **Ines Ingabire** have joined as **Portfolio Directors**.
- **Chester Rose Financial Planning** has appointed **Matt Hobbins** as **Financial Planning Manager**. Formerly, Matt was a Chartered Financial Planner at Amber River.
- **CISI** has appointed **James Paterson** as **Country Head for Australia and New Zealand**. Formerly, James was Associate Director at KPMG.

- **Cité Gestion** has appointed **Reto Taborgna** as **Chief Operating Officer and Business Risk Manager**, **Stefan Muller** as **Deputy Head of Private Banking Support Team**, and **Michel Ehrenhold** as **Head of Legal**. Additionally, **Yulia Romantseva** has joined as a **Private Banker**, specialising in HNW clients. Furthermore, **Africa Bootello** and **Joëlle Garcia** have been named as **Partners**.
- **Citi** has appointed **Khaled Ibrahim** as **Director of Origination and Global Family Office for EMEA**. Formerly, Khaled was Senior Vice President at BNY.
- **Citi Private Bank** has appointed **Paul Biesold** as **Investment Counsellor for Germany**, **Lee Holland** as **Banker** covering Africa, and **Jan Szczepinski** as **Banker** for Central Europe. Additionally, **Olga Bogdanova** has been promoted to **Head of Investment Counselling for the Middle East**, and **Tarang Garde** has been named **Team Head and Managing Director** on the India team. Furthermore, **Chad Reddy** has been appointed **Market Executive – West**.
- **Citi Wealth** has appointed **Federica Bonacasa** as an **Adviser** in its Art Advisory team, and **Olaolu Aganga** as **Head of Portfolio Construction** within its Chief Investment office. Additionally, **Mark Shpizer** has joined as **Managing Director** in its Asset Manager Relationships Team.
- **Clifton Asset Management** has appointed **Lisa Nicholson** as **Head of Compliance** for their Advisory Business. Previously, Lisa was Head of Advice Guidance at Succession Wealth.
- **Connection Capital** has appointed **Sam Kemp** as **Chief Executive and Partner**. Formerly, Sam was Chief Executive and Head of the Credit Opportunities Fund at BCI Capital.
- **Copia Capital Management** has appointed **Ian Hooper** as **Managing Director**. Formerly, Ian was Chief Investment Officer at Progeny.
- **Coutts** has appointed **Nitin Singh** as **Managing Director, Head of Managed Solutions**. Formerly, Nitin was Managing Director and Head of Asia Pacific at Barclays Private Bank.
- **Craven Street Wealth** has appointed **Caroline Hawkesley** as **Managing Director**. Formerly, Caroline was UK Managing Director at Progeny.
- **Deutsche Bank** has appointed **Kouroche Ahtari** as **Head of Private Banking for Suisse Romande**, **Muhammad Salahuddin** as **Senior Relationship Manager for the Middle East**, **Kostas Vasileiadis** as **Senior Relationship Manager in Greece**, and **Mike Savvides** as **Head of Investment Management, Emerging Europe**. Additionally, **Pin Duangdee** has been named **Director** in Southeast Asia.
- **Deutsche Bank Private Bank** has appointed **Steen Krage** as **Managing Director, Wealth Management, Denmark & Nordics** and **Soham Lamba** as **Director and Relationship Manager** in the bank's global South Asia team in Singapore. Additionally, **Stephen Yeung** has joined as **Director** in its Northern Asia Investment Management Team.
- **Edmond de Rothschild** has appointed **Hamza Hamza** as **Head of Investment Advisory** in Dubai. Previously, Hamza was Investment Adviser, Executive Director at Nomura Wealth Management.
- **Evelyn Partners** has appointed **Gurdeep Saini** as **Director in Financial Planning** in its London office, and **Robert Skilling** as **Financial Planning Director** in its Knutsford office.
- **Fairstone Group** has appointed **Oli Plant** as **Chief Operations Officer**, as Founder and Deputy Chair, **Lee Hartley, steps down**.
- **Farro Capital** has hired **Priyaka Dhingra** as **Head of Impact and Sustainable Finance**. Formerly, Priyaka was Senior Specialist, Responsible Investment Stewardship (APAC Lead) at Principles for Responsible Investment.
- **Flagstone International** has appointed **Alex Jefferies** as **Head of Origination**, as Flagstone's Chief Executive, **Simon Merchant, steps own**. Alex was most recently Director at Amberton Asset Management.
- **GAM Holding AG** has appointed **Gerhard Lohmann** as **Chief Financial Officer**. Formerly, Gerhard was Chief Operating Officer for EMEA and Chief Financial Officer for International Wealth Management at Credit Suisse.
- **Goldman Sachs** has promoted **John Mallory** and **Nishi Somaiya** to **Global Co-Heads of Wealth Management**, and **James Reynolds** to **Chief Executive of Asset Management International and Global Co-Head of Private Credit**. Additionally, **Kristin Olson** has been named **Global Head of Alternatives for Wealth** within Goldman Sachs Asset and Wealth Management, and **Gregory Calnon** has joined as **Global Co-Head of Public Investing**. Furthermore, **Michael Brandmeyer** has been named

- Global Head and Chief Investment Officer** of the external investing group with GSAM, and **Sara Naison-Tarajano** has been appointed **Head of Goldman Sachs Ayco**.
- **GSB** has appointed **Keith Buck** as **Chief Financial Officer**. Previously, Keith was CFO of Tuckers Solicitors.
- **Hampden Bank** has appointed **Liz Williamson, Ian Noke**, and **Claire Lattin** as **Banking Directors** in the North and Midlands.
- **Hargreaves Lansdown** has appointed **Matt Benchener** as **Chief Executive Officer**. Previously, Matt was Managing Director and Head of Personal Investor at Vanguard.
- **Hoxton Wealth** has hired **Michael Kerrison** as **Chief Financial Officer** and **Claire Spinks** as **Global Head of Tax**. Previously, Michael was Group CFO at Hurst Point Group, and Claire was Partner at Progeny.
- **HSBC** has appointed **Valentín Valderrábano** as **Chief Commercial Officer for its International Wealth and Premier Banking (IWPB) Division**. Additionally, **Max Xu** has joined as **Head of International Wealth and Premier Banking** for HSBC China, and **Samuel Chen** has been named **Head of Private Bank** for HSBC China. Furthermore, **David Rice** has been appointed as **Chief AI Officer**.
- **HSBC Private Bank** has promoted **Mike Hordley** to **Chief Operating Officer**. Additionally, **Phaneendar Bhavaraju** and **Rangan Krishnan** have joined the global India team in Singapore as **Senior Relationship Managers**, and **Alex Liu** has joined as **Head of Offshore China**. Furthermore, **Dawn Fung** has been appointed as **Head of Wealth Planning** in Southeast Asia, and **William Fok** has been appointed as **Country Head of Private Bank**, as Chief Investment Officer of the Private Bank and Premier Wealth in Asia, **Cheuk Wan Fan**, departs.
- **Hundle** has appointed **Marinella Salientes** as **Senior Investment Adviser**. Formerly, Marinella was Senior Investment Counsellor at Citi Private Bank.
- **Indosuez Wealth Management** has appointed **Rolf Schilde** as **Senior Executive Officer** and **Charles Tort** as **Deputy Chief Executive Officer** in the Dubai International Financial Centre.
- **Investec Bank Channel Islands** has appointed **Rob Duarte** as **Private Client Business Developer**. Previously, Rob was Senior Recruitment Consultant at Optimus Recruitment.
- **James Hambro & Partners** has appointed **Emma Varley** as **Portfolio Manager**. Emma was most recently Associate Director at Titan Wealth.
- **JM Finn** has appointed **Zoë Bancroft** as an **Investment Director** in the court of protection and personal injury team. Previously, Zoë was a Senior Investment Director at Investec Wealth & Investment UK.
- **JP Morgan** has appointed **Stephanie Davis** as **Head of Private Wealth Alternatives**. Formerly, Stephanie was Co-Head of US Private Wealth Solutions at Hamilton Lane.
- **JP Morgan Private Bank** has promoted **Yuxuan Tang** from Macro and Fixed Income, Currencies, and Commodities Specialist to **Head of Macro Strategy in Asia**. Additionally, **Sophie Barrington** has joined as **Vice President and Banker** and **Frank Wolters** has joined as **Executive Director and Banker**. Furthermore, **Rony Chaker** has been named **Executive Director and Banker** and **Alex Khan** has been appointed as **Managing Director and Banker**.
- **Julius Baer** has appointed **Jean Nabaa** as **Chief Operating Officer**, subject to regulatory approval, and **Winfried Daun** as **Global Head of Brand and Marketing**. Additionally, **Eric Rosset** has been promoted to **Head of its Verbier Branch**.
- **LGT Private Banking** has promoted **Philipp Lisibach** from Head of Strategy and Research to **Chief Investment Officer Europe**, as Chief Investment Officer and Head of Investment Solutions for Europe, **Gérald Moser**, departs.
- **LGT Wealth Management's** Founding Partner, Private Office, **Zoe Vucicevic**, is **leaving** the firm, alongside Partner **Effie Geraki**. Meanwhile, **Adam Parker** has joined as **Wealth Manager and Planner**, with **Elliot O'Brien** and **Andrew Bell** joining as **Head of Leeds** and **Wealth Planner**, respectively. Additionally, **Prachi Kodlikeri** has been promoted to **Partner**.
- **Lighthouse Canton** has appointed **Gurjeet Sohi** as **Managing Director and Head of Wealth Management for India**. Formerly, Gurjeet was Managing Director and Deputy Head of Wealth Management Coverage in India at Deutsche Bank.
- **Lombard Odier** has appointed **Julien Desmeules**, **Stéphane Herrmann**, **Samy Chaar**, and **Fabrice Rossi** as **Partners**. Additionally, **Christopher Grove** has joined as **Senior Private Banker and Executive Vice President**.

- **Maerki Baumann & Co** has promoted **Konstantinos Ntefeloudis** from Deputy Head of Private Banking to **Chief Investment Officer**.
- **Mattioli Woods** has appointed **Simon Taylor** as **Managing Director – Investment Product Solutions and Platform**. Simon was most recently Managing Director at Succession Advisory Services.
- **Mirabaud** has appointed **Ruggiero Lomonaco** as **Head of Islamic Finance** for Middle East. Formerly, Ruggiero was Head of Shariah Platform at Rasmala.
- **Moonfare** has appointed **Alice Avenel** as **Head of France and Benelux**. Formerly, Alice was Director of International Investor Relations at Audacia.
- **NatWest** has appointed **Katarina Rosen** as **People Director for Private Banking and Wealth Management**, including Coutts. Formerly, Katarina was Global Head Culture & Learning (incl. Employee Engagement) at UBS. Additionally, NatWest Private Banking & Wealth Management has appointed **Shona Baijal** as **Managing Director of Coutts**. Shona was previously Head of Private Clients UK at UBS Wealth Management.
- **Neba Wealth Management** has appointed **Marcus Crowther** as **International Financial Adviser**. Formerly, Marcus was International Financial Adviser at Skybound Wealth Management.
- **Nedbank Private Wealth** has appointed **Karim Chowdhury** as **Head of Private Banking** for the Isle of Man. Formerly, Karim was Director of Private Banking at Union Bancaire Privée.
- **Norman K** has appointed **Nicolas L’Hermite** as **Chief Executive Officer**. Previously, Nicolas was Head of Business Development at BNP Paribas.
- **Oakglen Wealth Planning** has appointed **Scott Cullinane** as **Financial Adviser** in its Jersey advisory team. Formerly, Scott was Private Client Manager and Financial Planner at Canaccord Genuity Wealth Management.
- **Octopus Money** has promoted **Dan Marsh** from Chief Strategy Officer to **Chief Executive**, succeeding **Ruth Handcock**, who has **stepped down**.
- **Officium Asset Management** has appointed **David Blanc** as **Partner**. Formerly, David was Managing Partner at ROYC Group.
- **Ortec Finance** has appointed **Jamie Holland** as **Senior Client Manager** within its global wealth solutions team. Formerly, Jamie was Technical Manager at Rathbones.
- **Pictet Wealth Management** has appointed **Harvey Chapel** as **Managing Director and Senior Private Banker**. Formerly, Harvey was Managing Director at Barclays Private Bank.
- **Quanta Group** has appointed **Harriet Griffin** as **Chief Operating Officer**. Formerly, Harriet was Chief Operating Officer at Perspective.
- **Quilter Cheviot** has appointed **Joseph Hill** as **Fund Research Analyst**. Previously, Joseph was Senior Investment Analyst at Hargreaves Lansdown.
- **Quintet Private Bank** has appointed **Lars Kalbreier** as **Group Chief Investment Officer**. Previously, Lars was Partner at Bainbridge.
- **Raffles Family Office** has appointed **Pradinan Arkarachinores** as **Managing Director, Relationship Management**. Formerly, Pradinan was Managing Director at BNP Paribas.
- **Rathbones Group** has appointed **James Hall** and **Daniel Curtis** as **Investment Directors**. Additionally, **Robert Sears** has been appointed as **Chief Investment Officer**, as Co-Chief Investment Officers, **Edward Smith** and **Liz Savage, step down**. Head of Proposition, **Michelle Davies**, has also **stepped down**. Furthermore, **Dan Thompson** has joined as **Portfolio Director** and **Bruce Saunderson** has joined as **Senior Director of Wealth Planning**.
- **RBC Brewin Dolphin** has appointed **Mursal Ali** and **Tom Kiildsen** as **Wealth Managers** in their London office, **Neil Trickett** as **Wealth Manager** in their Cambridge office, and **Emily Tarrant** as a **Wealth Manager** in their Cardiff office. Additionally, **Simon Bird** has been promoted to **Head of Marlborough Office** and **Mike Williams** to **Head of Shrewsbury Office**. Furthermore, **Alisdair Dewar** has joined as **Head of Office for Edinburgh**.
- **REYL Overseas** has appointed **Elias Bachmann** as **Chief Executive**. Formerly, Elias was Partner and Head of the Investment Group at BSW Wealth Partners.
- **Rothschild & Co** has appointed **Monika Foeth** as **Market Team Head Latin America** and **Sara Palomino** as **Client Adviser**.
- **Sarasin & Partners** has appointed **John Muir** as **Business Development Director for Scotland, Northern Ireland and Northern England**. Formerly, John was a Sales Director at O-IM Investment

- Services. Additionally, **Fiona O'Neill** has joined as **Head of Investment** from Fidelity International where she recently served as Head of Global Equity Research Capabilities.
- **Schroders Wealth Management** has promoted **Adam Jupp** from Head of Analytics to **Head of Data and Artificial Intelligence**.
  - **Skybound Wealth Management** has promoted **Taylor Condon** from Senior Financial Planner to **Country Manager for Spain**.
  - **Sparrows Capital** has appointed **Gareth Perry** as **Business Development Manager**. Formerly, Gareth was a Senior Business Development Manager for South West and Northern Ireland regions at Time Investments. Additionally, **Steven Cohen** has joined as **Senior Investment Analyst** from Lumin Wealth where he was a Senior Investment Manager.
  - **St James's Place** has appointed **Lea Blinoff** as **Director of Investment Solutions**. Formerly, Lea Co-Founded and was Deputy Chief Executive at Vestrata. Additionally, **Rio Stedford** has joined as **Investment Product Strategy Director**. Previously, Rio was Head of Wealth at Finura.
  - **Standard Chartered Global Private Bank** has appointed **Hong Hu** as **Group Market Head for Greater China**. Formerly, he was Executive Director at Bank of Singapore.
  - **Standard Chartered** has appointed **Sundeep Gantori** and **Jonathan Liang** as **Chief Investment Officer, Equities**, and **Chief Investment Officer, Fixed Income and FX**, respectively. Additionally, **Zohaib Khan** has joined as **Director, Wealth Planning and Family Advisory** and **Peter Burrill** has been named **Interim Group Chief Financial Officer**. Furthermore, **Raza Jafree** has been appointed as **Global Head of Private Client Sales**.
  - **Swiss Private Bank Bergos'** Chief Executive, **Peter Raskin**, is **stepping down**.
  - **Syz Bank** has promoted **Nicolas Syz** to **Chief Executive**. Additionally, **Florian Marini** has joined as **Head of Equities**, as Chief Operating Officer, **Boris Chave**, **departs**.
  - **Titan Wealth** has appointed **Andrew Ingram** and **Brett Coombs-Goodfellow** as **Senior Investment Manager** and **Investment Manager**, respectively, and **Brendan McCullagh** has joined as **Senior Compliance Administrator**.
  - **Tribe Impact Capital** has appointed **Steve Bryce** as **Equity Analyst**, **Abbie Brown** as **Wealth Analyst**, **Jenny Kenlin** as **Compliance Officer**, and **Callum Quinn** as **Sales and Client Relationship Manager**.
  - **TrinityBridge** has appointed **Tom Miller** as **Head of Bespoke Investment Management**. Previously, Tom was Regional Head of South West and Wales at RBC Brewin Dolphin.
  - **Tyndall Investment Management** has appointed **Josephine Fay** as **Head of Private Client Distribution**. Formerly, Josephine led the distribution channel for professional services at RBC Brewin Dolphin.
  - **UBS Global Wealth Management** has appointed **James Cheo** to its **Chief Investment Office Team** in Asia Pacific, covering Southeast Asia, India and Australia. Additionally, **Carl Ashton** has joined as **Client Adviser** in UBS GWM's Australia International Team in Singapore.
  - **UBS** has promoted **Judy Spalthoff** to **Head of Family Office and UHNW Client Services** for the Americas and **Aglinda Hoxha** to **Desk Head HNW – Wealth Management UK**. Additionally, **Andrew Bird** is joining as **Head of Global Wealth Management Australia**.
  - **Union Bancaire Privée** has appointed **Fahd Iqbal** as **Head of Investment Services**, and **Joy Chammas** and **Mohammed Zaheer** as **Market Heads in the Middle East**.
  - **Vontobel** has appointed **Christopher Huwyler** and **Sebastian Luck** as **Relationship Managers**.
  - **W1M** has promoted **Joshua Moss** to **Head of US Private Wealth** and **Alexander Cottrell** to **Director**. Additionally, **Edward Blake**, **Jennifer Fisher**, **Tom David**, and **Steven Iffland** have been promoted to **Managing Directors**.
  - **Wealth Club** has appointed **Susannah Streeter** as **Chief Investment Strategist**. Formerly, Susannah was Head of Money and Markets at Hargreaves Lansdown.

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

# The Team

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*Valentine Thomas & Partners is a leading investment and wealth management executive search firm covering the EMEA markets.*

