



VALENTINE THOMAS

— & PARTNERS —

People Moves | Wealth Management

Q2 2026

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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.

- **Alpha FMC** has appointed **Charles Cummins** as **Senior Partner** in its North American Wealth Management consulting team. Previously, Charles was Managing Director at EY.
- **AITi Global** has promoted **Nancy Curtin** from Global Chief Investment Officer to **Interim Chief Executive Officer** and to its board of directors.
- **Apex Group** has appointed **Jamie MacLeod** as **Executive Chair** of Apex Wealth and Apex Foundation. Formerly, Jamie was Chief Executive of Bordier & Cie.
- **Arbuthnot Latham** has appointed **Thomas Bond** as **Private Banker**, **Georgina Cummings** as **Investment Manager**, and **Michal Walkowski** as **Investment Risk Manager**.
- **Bank Aston** has appointed **Dr Michael Eichhorn** as **Chief Risk and Compliance Officer**. Formerly, Michael was Group Head of Traded Risk at Landesbank Baden-Württemberg.
- **Bank of Singapore** has appointed **Vi Sun Yang** as **Head of Private Banking** for the Association of Southeast Asian Nations. Additionally, **Elvin Ho** has joined as **Head of Family Office and Structuring Solutions** and **Lim Leong Guan** has joined as **Head of Private Banking, Middle East, South Asia and International**.
- **Bank von Roll AG** has appointed **Philipp Würmli** as **Head of Private Banking**. Formerly, Philipp was Head of Private Banking at Bergos AG.
- **Banque Heritage** has promoted **Onur von Burg** from Head of Discretionary Markets to **Head of Private Banking, Geneva**.
- **Barclays** has promoted **Alexander Harrison** from Country Chief Executive for Singapore and Chief Operating Officer for Middle East and Africa as **Interim Head of Private Bank Singapore**. Alexander will continue in those roles alongside the new interim position.
- **Barclays Private Bank** has appointed **Parmbir Gill** as **Investment Adviser**. Formerly, Parmbir was Investment Manager at Saltus.
- **Bowmore Financial Planning** has appointed **David Floyd** as **Head of Private Client**. Formerly, David was Regional Manager at Titan Wealth Planning.
- **Brooks Macdonald** has appointed **Jean-Paul Jaegers** as **Head of Asset Allocation**. Formerly, Jean-Paul was Head of Asset Allocation at Barclays Wealth Management.
- **Capital Generation Partners** has appointed **Chady Jouni** as **Chief Investment Officer**. Formerly, Chady was Senior Multi Asset Portfolio Manager and Executive Director within the Chief Investment Officer at JP Morgan Private Bank.
- **Cazenove Capital** has appointed **Arietta Bortot** as **Head of Business Risk and Control**. Previously, Arietta was Chief Operating Officer at UBS. Additionally, **Jamie Stafford** has joined as **Business Development Director** for the South of England from Liontrust Asset Management, where he was Strategic Partner Relationship Manager.
- **Church House Investments** has appointed **Marcus Brooks** to **expand its private client presence in Scotland and North of England**. Formerly, Marcus was Senior Investment Director at Brooks Macdonald.
- **Cité Gestion** has appointed **Claudia Marigliano** and **Pedro Hernandez** as **Private Bankers**. Formerly, Claudia was Head of Wealth Management for Germany and Austria at UBP, and Pedro was a Relationship Manager at UBP.
- **Citi Private Bank** has promoted **Sarah Courtney-Dockett** from Managing Director and Private Banker to **Market Executive of the Philippines, Australia and New Zealand**.
- **Citi Wealth** has appointed **Philip Pellegrino** as **Head of Insurance and Retirement** within its investment solutions team, and **Nadiya Konstantynova** as **Chief Operating Officer**. Additionally, **Breanne Meaney** has been promoted to **Head of Client Experience** in its Wealth and Work division.
- **Citibank** has promoted **Rajeev Garg** to **Head of Wealth, UAE**. Formerly, Rajeev was Asia South Citigold Business Execution Lead.
- **Clifton Asset Management** has appointed **Ashley Wise** as **Chief Technology Officer**. Formerly, Ashley was Partner and CTO at Saltus.

- **Cooper Parry Wealth** has appointed **Chris Davies** and **Paul Holbrook** as **Client Relationship Director**, and **Business Development Director**, respectively. Formerly, Chris was Senior Director in Rathbones' Financial Planning Division, and Paul was HSBC's Regional Director in the East Midlands.
- **Coutts** has appointed **Sarah Dow** to **Lead Digital Asset Strategy and Delivery**, as Executive Director, **Alan Marshall, departs** the firm. Sarah was previously Lead Product Owner of Lloyds Banking Group's Digital Finance Innovation Lab.
- **DBS Private Bank Thailand and the Philippines'** Market Head, **Edwin Tan**, has **left** the firm.
- **Deutsche Bank** has appointed **Alexandra Skreta** and **Martin Hediger** to grow its **Onshore Wealth Management Business** in Switzerland. Additionally, **Yves Rahme** has joined to help expand its coverage of the **Saudi Arabia Market**.
- **Deutsche Bank Private Bank** has appointed **Rikke Strömqvist** as **Director and Senior Relationship Manager** in Luxembourg, and **Dawn Chong** as **Director**, **Jet Chan** as **Vice President**, and **Kent Lee** as **Co-Head of FX Advisory**, in Hong Kong. Additionally, **Adam Wereszczynski** and **Andrew Pryor** have joined as **Managing Directors** within its UK Client Coverage team, and **Siang Jinn Foo** has joined as **Team Lead in Southeast Asia**. Furthermore, **Piotr Chudzik** has been named **Head of Private Bank in Poland**.
- **EFG International** has appointed **Luc Jenkins** as **Head of Private Banking** in Geneva. Previously, Luc was Senior Client Relationship Manager, Head of French Speaking Region at ABN AMRO Private Banking. Additionally, **Ranjit Khanna** has taken a **leadership role in their UHNWI business** in the Gulf region, joining from Bank of Singapore, where he was Head of Private Banking for Europe and the Middle East.
- **FNZ** has appointed **Andy Brodie** as **Group Head of its UK Business**. Formerly, Andy was Group Chief Operating Officer at Rathbones. Additionally, **David Moss** has joined as **Group Chief Product Officer** from BNY, where he was Head of Alts Bridge, Growth Ventures Lead.
- **Foster Denovo** has promoted **Chris Thomas** from Head of Investments to **Director of Investments**.
- **Goldman Sachs** has appointed **Archana Vemulapalli** as **Global Head of AI Product Management and Strategic Relations**. Formerly, Archana was Global Head of Product and Strategy for Data and AI at Amazon Web Services.
- **Hampden Bank** has appointed **Paul de la Salle** and **Graeme Mann** as **Business Development Directors** in London and Edinburgh, respectively. Formerly, Paul was a Private Client Adviser at City Finance Brokers, and Graeme was in the Business Development team at Coutts.
- **Handelsbanken** has promoted **Anton Romare Keller** from Group Chief Investment Officer to **Chief Executive**.
- **HSBC** has appointed **Alfonso Gómez** as **Chief Executive of the Swiss Private Bank and Country Head of Switzerland**. Formerly, Alfonso was Chief Executive of BBVA Switzerland.
- **HSBC Private Bank and Premier Wealth** has promoted **Desmond Kuang** from CIO China to **Chief Investment Officer, Asia**.
- **HSBC Private Bank** has promoted **Gautam Anand** to **Head of Global India**, **Ally Wang** to **Head of Research Marketing for Asia**, and appointed **Edward Chiu** as **Onshore Taiwan Market Head**. Additionally, **Brad Wener** has joined to **Lead the UK International Desk**, and **Raphael Ostfeld** has joined as **Head of Switzerland Domestic Market**. Furthermore, **Helena Wyatt** has been appointed **Private Banker**, **Christopher Hutchinson** has joined as **Director and Relationship Manager**, and **Gloria Sun** has joined as **Market Head of Offshore Taiwan**.
- **Investec** has promoted **Hollie Sleight** from Portfolio Manager to **Head of Offshore Real Estate Lending**.
- **Isio** has appointed **Dan Thomas** as **Chief Executive**. Formerly, Dan was Head of Markets at KPMG.
- **James Hambro & Partners** has appointed **Nicola Day** as **Partner and Head of its Bristol Office**. Previously, Nicola was Deputy Head, Senior Investment Director and Chair of the Investment Committee at Rathbone Greenbank.
- **JAR Capital** has appointed **Kristinn Kristinsson** as **Partner and Senior Relationship Manager**, based in Geneva. Formerly, Kristinn founded and was Chief Executive of 3T Family Office.
- **JP Morgan Private Bank** has appointed **Andrew Whiting** as **Vice President and Private Banker**, based in Hong Kong, and **Fujin Yan** as **Vice President and Private Banker**, based in Singapore, and **Cynthia Chung** as **Executive Director and Investment**

Specialist in the UK team. **Emmeline Vega, Begoña Pita, Rafael Cervelli**, and **Rebecca Wong** have joined the bank as **Executive Directors** in their France, Spain, Brazil, and China teams, respectively. Additionally, **Louise Granath** and **Alexander Stott** have joined as **Managing Directors**, and **Jessica Biermans** has joined as **Executive Director and Banker** for Benelux. Moreover, JP Morgan Private Bank has hired **Sabrina T Jung** as **Executive Director and Banker** in Switzerland, **Viktor Apsokardos** as **Executive Director and Banker** in Athens, **Felix Tölle** as **Vice President and Banker** in Germany, **Pablos Artigas** as **Managing Director** in Miami, and **Érika Lucchesi** as **Vice President and Investment Specialist** in Geneva. Furthermore, **Khayyam Jumani** has been promoted to **Managing Director** and **Sharon Xie** has been named as **Managing Director and Team Lead**, based in Singapore. Finally, **Yan Qiao** has joined as **Vice President and Lending Specialist**, **Adam West** has been appointed **Executive Director** in their Manchester office, and **Xinhui Su** has been named **Head of Portfolio Solutions, Asia**.

- **Julius Baer Germany AG** has appointed **Klaus Naeve** as **Chief Executive**, effective September 2026. Formerly, Klaus was Head of Wealth and Asset Management at Berenberg.
- **Julius Baer** has appointed **Rajat Sood, Saurav Shekhar**, and **Anshul Rai** as **Private Bankers** to its Non-Resident Indian Team in Hong Kong, as Group Chief Financial Officer, **Evie Kostakis, steps down**. Additionally, Chief Executive of India, **Umang Papneja**, has **left** the firm, with **Kunal Sumaya** being named **Interim Country Head, India**. Furthermore, **Riccardo Corzani** has been appointed as **Manager** of Bank Julius Baer's Lugano branch.
- **LGT Wealth Management** has appointed **Anchalee Bungsongsikul** as **Chief Executive** of its business in Thailand and **Ben Roberts** as **Investment Manager**, based in their Manchester office. Additionally, **Arthur Begasino** has joined as **Head of Investment Solutions, Australia**.
- **Lighthouse Canton** has appointed **Michael Darriba** as **Managing Director**. Formerly, Michael was Head of International Mortgages at JP Morgan Private Bank.
- **Lloyds** has appointed **Alessandro Cummunale** as **Head of Wealth Management and Family Office Coverage**. Formerly, Alessandro was Associate Partner at Vishon SCF Srl.

- **Lombard Odier** has appointed **Eugene Chan** as **Team Leader for South East Asia**, and **Jason Yap, Joey Huang**, and **Isabella He** as **Relationship Managers**. Additionally, **Edwin Tan** has joined as **Market Head for Southeast Asia**.
- **Moonfare** has appointed **Chris Maule** as **Head of UK**. Formerly, Chris was Client Director at Connection Capital.
- **Murphy Wealth** has appointed **Shane Presley** as **Senior Financial Planner**. Formerly, Shane was Chartered Financial Planner at Ethical Futures.
- **NatWest Group** has completed its acquisition of Evelyn Partners, with Evelyn Partners' Chief Executive, **Paul Geddes**, and Chief Financial Officer, **Alex Gersh, stepping down**. Current Chief Investment Management Officer at Evelyn Partners, **Chris Kenny**, will become **Chief Executive**, and Deputy Chief Financial Officer, **Din Mustaffa**, will become **Chief Financial Officer**.
- **Nedbank Private Wealth** has appointed **Andrew Halsall** as **Senior Wealth Adviser**, based in Dubai. Formerly, Andrew was Director at AES International.
- **Nine Edge Wealth** has appointed **Jennifer Peaty** as **Chief Compliance Officer**. Formerly, Jennifer was Director of Regulatory Consultancy and Advice Quality at Fintel.
- **OCBC** has appointed **Fernando Baay** as **Head of Private Banking in Indonesia**. Formerly, Fernando was Executive Director at Julius Baer.
- **P1 Investment Management** has appointed **Joanne Benson** and **Emma Clarke** as **Investment Managers**. Formerly, Joanne was Managing Director of the discretionary investment management business at Copia Capital, and Emma was a member of the Investment Committee at HFMC Wealth.
- **Pictet Wealth Management** has appointed **Kelvin Tay** as **Chief Investment Officer** for APAC. Formerly, Kelvin was Managing Director and Regional CIO at UBS.
- **Quilter Cheviot** has appointed **James Charlton** as **Investment Manager** in its Liverpool office. Formerly, James was a Private Banker at Barclays Private Bank.
- **Quintet Private Bank** has appointed **Dr Otto Huber** as **Group Chief Financial Officer**. Formerly, Otto was Head of Structured Solutions and Treasury at Bank Vontobel.

- **Raffles Family Office** has appointed **Eileen Wee** as **Executive Director, Head of Wealth Planning, South East Asia** and **Daniel Lai** as **Executive Director, Head of Wealth Planning, Greater China**. Formerly, Eileen was Executive Director at UBS, and Daniel was Senior Director and Wealth Planner at DBS.
- **Rathbones** has appointed **Dolores Geaney** as **Managing Director of Rathbones in Ireland**, and **Joel Graves** as **Head of Investment Management** for the Channel Islands. Meanwhile, Head of Bristol Office, **Sam Wright**, has left the firm.
- **Raymond James** has appointed **Seth Ford** as **Chief Architect** to lead the development of technology across the firm's platforms. Previously, Seth was Chief Architect and Head of Agentic Digital Products at Vanguard.
- **RBC Brewin Dolphin** has appointed **Andrea Yung** as **Wealth Manager**, based in Manchester. Formerly, Andrea was Investment Director at Rathbones.
- **RBC Wealth Management** has appointed **Abhijit Shetty** as **Managing Director and Head of the Global South Asia Team**, **Sandesh Assao** as **Executive Director**, and **Sudarshan V Athreya** as **Managing Director**. Additionally, **Amanda Yeung** has joined as **Managing Director and Team Head**, and **Felix Yuan**, **Anthony Shiu**, and **Desmond Kwong** as **Directors**.
- **Rothschild & Co** has appointed **Ilga Haubert** as **Head of Investments for its UK Wealth Management Business**. Formerly, Ilga was Head of Equities at Fidelity.
- **Rothschild & Co Wealth Management** has promoted **Katharine Taylor** to **Managing Director**. Additionally, **Álvaro Santos** has joined as **Client Adviser** in its Spanish team, and **Oren Buchman** has joined as **Senior Client Adviser** in its Israel office.
- **Rothschild Martin Maurel** has promoted **Grégoire Salignon** from Partner to **Deputy Managing Director**.
- **Ruffer** has promoted **Jon Dye** from Partner to **Co-Chief Investment Officer**, succeeding **Neil McLeish**, who will assume a new role as **Head of Fixed Income, Currencies and Commodities (FICC) research**.
- **Schroders Wealth Management** has appointed **Evonne Tan** as **Chief Executive of Asia Wealth Management**, based in Singapore. Formerly, Evonne was Managing Director and Head of Private Bank for Singapore at Barclays. Additionally, **Sharon Sim** has joined as **Head of Business Development, Asia** from AITi Tiedemann Global, where she was Director.
- **SEI** has appointed **Barry Frame** as **Head of International Private Banking and Wealth Management Services**. Formerly, Barry was Chief Commercial Officer at Avaloq.
- **SIX** has appointed **Markus Habel** as **Chief Financial Officer** and member of the executive board. Formerly, Markus was Senior Partner and Global Head of Wealth and Asset Management and Financial Services Market Infrastructure at Bain & Company.
- **Standard Chartered Private Bank** has appointed **Derick Tan** and **Jit Chong Soh** as **Relationship Managers**. Both will be based in Singapore. Additionally, Global Vice Chairman, **Vivian Chan**, has left the bank.
- **Stonehage Fleming** has promoted **Prandhana Naidu** from Senior Equity Analyst to **Deputy Portfolio Manager** of their Global Best Ideas Equity Strategy.
- **Titan Wealth International** has appointed **Mark Leale** as **Senior Executive Officer** and **Rob Hodgson** as **Head of Wealth Planning** of its Dubai International Financial Centre. Formerly, Mark was Head of Dubai and Senior Executive Officer at Quilter Cheviot, and Rob was Wealth Planning Director at Vermeer Partners.
- **UBS Global Wealth Management** has promoted **Wayne Gordon** from Managing Director, CIO, Head of Investment Advisory & Content, APAC to **Managing Director, Australia Head of Advisory and Sales**. Additionally, **Damian Robinson** has joined as **Market Team Head** from JBWere, where he was Head of Advice for New South Wales and Queensland.
- **UOB Private Bank** has appointed **Paul Zhou** as **Market Head for Greater China**. Formerly, Paul was Head of Sales and Distribution at UOB China. Additionally, **Dennis Hong** has joined as **Regional Market Head, Greater China and North Asia** from Bank of Singapore, where he was Market Group Head and Managing Director, Asia Pacific.
- **VP Bank** has appointed **Thomas Ziegler** as **Head of Markets** and member of the executive board. Formerly, Thomas managed client developments and relationships at UBP.
- **W1M Wealth Management** has appointed **Chris McGuinness** as **Portfolio Manager** in the US Private Wealth Team, **Jan Thompson** as **Wealth Manager**, and **George Haggas** as **Portfolio Manager in the Financial Intermediary Office**. Additionally, **Nick Travis** has joined as **Portfolio Manager** in its Private

Wealth team, and **Henry Johnstone** has joined as **Portfolio Manager** within its Adviser Solutions Proposition. Furthermore, **Nick Scarborough** has joined as **Portfolio Manager**, **James Hoare** has been named **Wealth Manager**, and **Lewis Cole** has been appointed as **Wealth Manager** within the private investment office.

- **Walker Crips'** Joint Chief Executive, **Christian Dougal**, has **left** the firm.
- **Weatherbys** has appointed **Mark Hassett** as **Senior Private Banker** and **Heather Sonnet** as **Team Lead, Senior Private Banker**. Formerly, Mark was Managing Director at EFG Private Bank, and Heather was Director at UBP.

**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.