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2021
AWARDS

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Excellence Awards

2021 Special Report



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Foreword

W

elcome to this special report celebrating the inaugural *eprivateclient* Excellence Awards which was held as a live virtual event this year.

The Awards programme has been established in order to recognise the outstanding achievements of firms across the UK and offshore legal, tax, fiduciary and advisory professions over the past year.

Modelled on the success of the PAM Awards, the *eprivateclient* Excellence Awards employ a similarly independent process. One key difference is that Tier I of the well-established *eprivateclient* annual rankings for each discipline forms the core of the lists of firms that qualified to enter.

The *eprivateclient* Excellence Awards were judged exclusively by our in-house team of experienced senior journalists and researchers, to avoid any potential conflicts of interest between the judging of the different categories.

The 2021 Awards had entries from over 40 firms across the private client sector with the *eprivateclient* Excellence Awards Judging Panel nominating 27 firms on the shortlist of finalists with 11 firms winning Awards.

Everyone at PAM Insight would like to congratulate all of the winning firms as well as the finalists and to thank the Awards' sponsors, without whom the initiative would not be possible.

We very much look forward to hosting the next Awards, and recognising the stand out firms in the sector, in person in 2022!



Will Sidery

Editor
eprivateclient

2021 eprivateclient Excellence Awards

Winners & Finalists

Private Client Law Firm

Large

Winner **Taylor Wessing**
Finalist **Charles Russell Speechlys**
Mishcon de Reya

Commendation
Womble Bond Dickinson

Private Client Law Firm

Boutique

Winner **The Burnside Partnership**

Family Law Firm

Large

Winner **Mishcon de Reya**
Finalist **Charles Russell Speechlys**
Withers Worldwide

Family Law Firm

Boutique

Winner **Manders Law**
Finalist **Jones Myers**
Peters May

Private Client Offshore Law Firm

Multi-jurisdiction

Winner **Carey Olsen**

Private Client Trust Company

Listed & bank/PE owned

Winner **JTC Group**
Finalist **Ocorian**

Private Client Trust Company

Independent

Winner **Crestbridge**
Finalist **Accuro Fiduciary**
R & H Trust Co (Jersey)

Commendation
Highvern
Saffery Champness Registered Fiduciaries

Private Client Accountancy Firm

Large

Winner **Tilney Smith & Williamson**
Finalist **BDO**
KPMG

Private Client Accountancy Firm

Boutique

Winner **Rawlinson & Hunter**
Finalist **Buzzacott**
Tax Advisory Partnership

Investment Consulting Firm

Independent

Winner **Asset Risk Consultants**
Finalist **IAM Advisory**
JTFM

Wealth Planning Firm

Independent

Winner **The Private Office**

Private Client Law Firm Large

Winner **Taylor Wessing**

Finalists **Charles Russell Speechlys,
Mishcon de Reya and
Womble Bond Dickinson**

“On behalf of the team at Taylor Wessing I would like to thank PAM Insight and eprivateclient for this recognition. This award endorses and recognises the quality, the breadth and the depth of the team at Taylor Wessing and also the fact that Private Wealth is at the very heart of the firms national offering. I am proud to be part of an expanding team that is further enhanced by the team that joined from BCRP earlier this year.”



Alexander Erskine
partner,
Taylor Wessing

The most vigorously contested category for the awards saw Taylor Wessing crowned as the 2021 winners, with Charles Russell Speechlys and Mishcon de Reya shortlisted and North of England and now Anglo-US stalwarts Womble Bond Dickinson commended. The eprivateclient Excellence Awards’ judging panel recognised the significant growth over the past year Taylor Wessing had undertaken, including the recruitment of a number of new partners and senior lawyers from BCLP. The panel also highlighted its strong next generation programme and praised the firm’s dignity at work policy which promotes an inclusive culture, respecting differences and treating everyone with dignity and fairness.

Private Client Law Firm - Large

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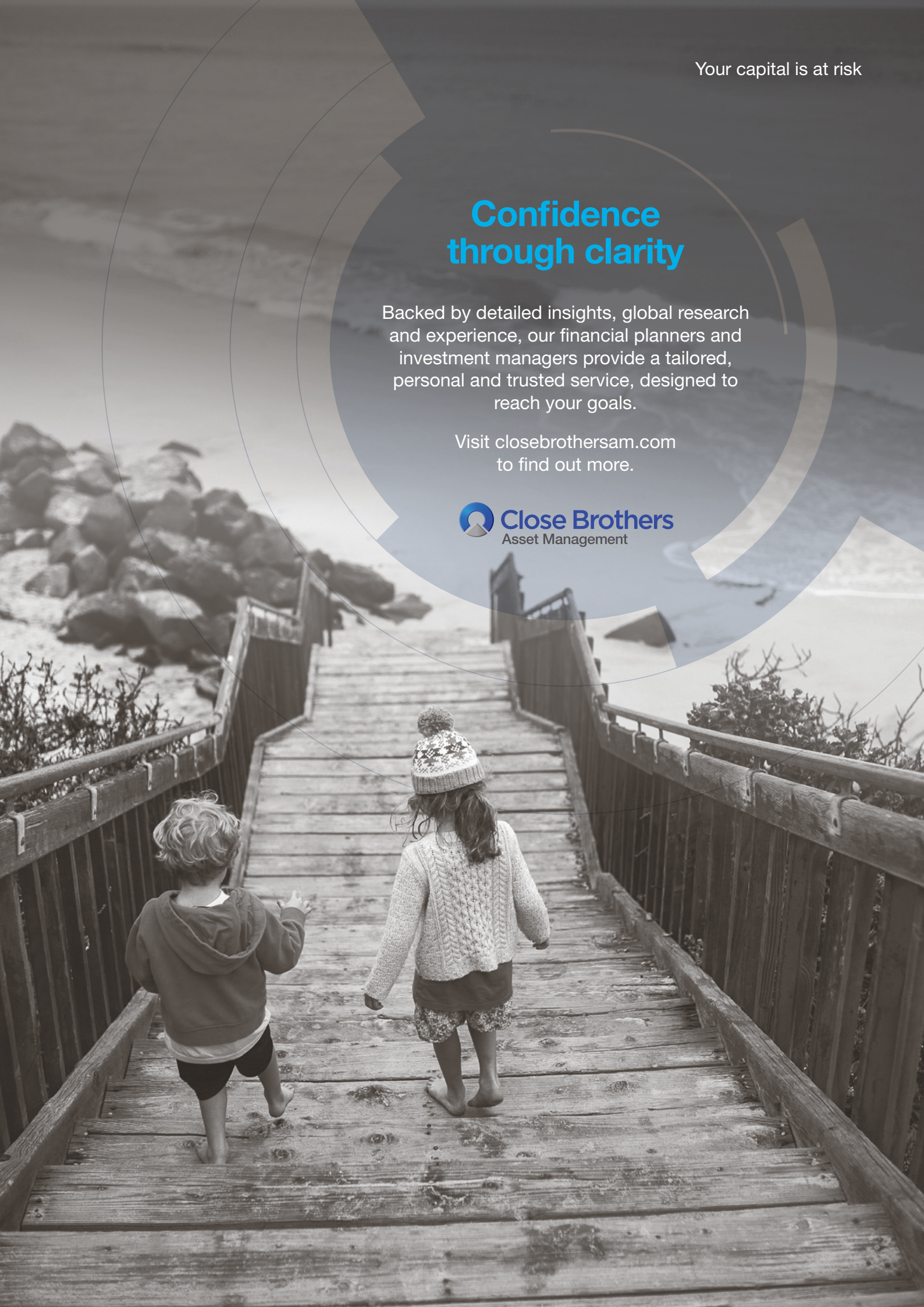
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Private Client Law Firm Boutique

Winner **The Burnside Partnership**

Awarded to The Burnside Partnership, which has developed significantly since it was founded in 2015, growing from 2 to 27 staff in 6 years. The judging panel was impressed to see that the firm's lawyers work alongside tax advisers to offer clients tailored advice. This tailored approach is evident in the establishment of The Burnside Partnership for Life, aimed at addressing the needs of younger clients, whilst staff's wellbeing is provided for through training and regular wellness initiatives.

Private Client Law Firm - Boutique

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Investec Wealth & Investment

"I am absolutely delighted that our firm has won this award. I know that everyone at the BP will be thrilled and would like to thank the Judges. The firm has been built around the ethos of excelling in our specialism in private client and tax and offering really first class client service. And that ethos has remained at the core of our firm. We are really looking forward to continuing our growth, built around the fantastic team of people we have, every single team member, past and present, has contributed to our success in being awarded this *privateclient* Excellence award."

Della Burnside

managing partner, Burnside Partnership





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Family Law Firm

Large

Winner **Mishcon de Reya**

Finalists **Charles Russell Speechlys and Withers Worldwide**

The 2021 Family Law Firm (large) winner was Mishcon de Reya, with Charles Russell Speechlys and Withers Worldwide both shortlisted. The judging panel praised Mishcon's strong focus on equality, diversity and inclusion, its future-looking approach to clients' needs (including the launch of an academy for coaching NextGen clients).

Private Client Family Law Firm - Large

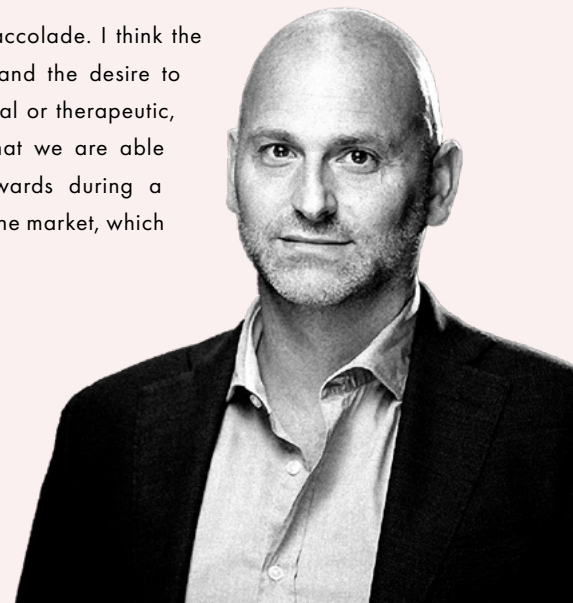
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"Thank you to the judges for this accolade. I think the innovation and care for clients, and the desire to find solutions, by way of traditional or therapeutic, is a trait of our firm. The fact that we are able to celebrate these inaugural awards during a pandemic shows the resilience of the market, which is an award to us all."

Filippo Nosedà

partner,
Mishcon de Reya





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Family Law Firm Boutique

“We are absolutely thrilled and delighted to have won this award, it means a great deal to myself and my team to be recognised. Our guiding point has always been for striving excellence so to win the inaugural awards could not be any better.

“External recognition of the team, its skills, service, and achievements by a respected and independent organisation such as *eprivateclient* is highly valued both internally and externally. As a firm we are discerning about which awards we enter and only apply for awards which we can be confident are based on a process of complete integrity and transparency in terms of the judging process.

“We aim to deliver best advice, service, and solutions to clients to enable them to achieve their objectives in the most cost effective manner. With this in mind we employ a “team approach” with every level of fee earner working with clients on their matter. Clients praise this approach, ensuring as it does that everyone with whom they have contact is familiar with their case and unnecessary charges, occasioned by senior staff alone progressing matters, are avoided.”

Mary-Ann Wright

managing partner,
Manders Law



Winner **Manders Law**

Finalists **Jones Myers and
Peters May**

The Family Law Firm (boutique) category was won by Manders Law with Yorkshire-based Jones Myers and London firm Peters May shortlisted. The judging panel was impressed by Manders Law’s comprehensive submission, its multi-lingual team and significant and consistent progress since it was founded in 2018. The firm’s submission demonstrated impressive growth, whilst highlighting its expanding services provision to now include surrogacy matters and its green credentials, by operating on a completely paperless files basis.

Private Client Family Law Firm - Boutique

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Private Client Offshore Law Firm

Multi-jurisdiction

Winner **Carey Olsen**

The final law firm Award was for the Private Client Offshore Law Firm (multi-jurisdiction). This year's winner was Carey Olsen, whose submission highlighted its ability to provide clients with a full service legal offering, its excellent charitable work, its strong ESG credentials and development opportunities and initiatives available to the next generation of both clients and offshore lawyers.

"We are very excited and honoured to accept this award in the inaugural year. Thank you to *eprivateclient* and the judges. At Carey Olsen we really do strive to provide a very high quality of advice across our jurisdiction so I am very proud to accept this award on behalf all my hard working colleagues."

Keith Dixon

partner,
Carey Olsen



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Private Client Trust Company

Listed & bank/PE owned

Winner **JTC Group**

Finalists **Ocorian**

The winner of the 2021 Private Client Trust Company (listed & bank/PE owned) was JTC Group with Ocorian shortlisted. The judges found that JTC Group's submission showed the firm had demonstrated significant growth and highlighted its wide range of services, flexible fee arrangements and impressive talent management initiatives, the JTC Academy and JTC Gateway. At the same time the firm was commended for its pledge to become carbon neutral by the end of 2021, as well as its charitable initiatives.

**Private Client Trust Company -
Listed & bank/PE owned**

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Sarasin & Partners

"I am absolutely delighted to have won this award and behalf of everyone at JTC I would like to thank *eprivateclient*, the industry peers and the sponsors. This award is a testament to our inclusive, diverse and shared ownership culture, which makes us stronger as JTC Group, but also for our clients and for all our counterparties who deal with JTC."

Sailesh Navsaria

group director – private client services,
JTC Group



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"It is an honour to represent Crestbridge to accept this award. It goes without saying that the last 12 months have been extraordinary challenge for everyone but the way the Crestbridge Family Office team have risen to the task and maintained its full commitment to our has been truly inspiring. We are immensely proud of our teams hard work and resilience over a challenging year and we are thrilled that their commitment to our clients, and to each other has been recognised by way of this award. We hope for a much smoother sail for everyone in the near future.

"We were delighted to be named Best Independent Private Client Trust Company at these Awards, which really do stand out because of their credibility and the robust nature of the judging process.

"privateclient has been covering the UK and wider private client space for some time and has a really positive reputation amongst the private client community, so to be deemed to be award winning through these awards is a fantastic endorsement for us.

"Submitting a nomination, responding to the in-depth and technical criteria and subsequently being assessed by an independent panel of experts was a really rigorous process that you don't always find in industry awards – that's reflected in the really high-quality firms in the shortlist.

Heather Tibbo

group director – private client services,
Crestbridge



Private Client Trust Company Independent

Winner

Crestbridge

Finalists

**Accuro Fiduciary and
R & H Trust Co (Jersey)**

Commended

**Highvern and
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Private Client Trust Company - Independent

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Helen Rynhoud would be delighted to have a further conversation on **020 3817 3436** or **HRynhoud@jameshambro.com**



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Private Client Accountancy Firm Large

Winner **Tilney Smith & Williamson**

Finalists **BDO and
KPMG**

The 2021 *privateclient* Excellence Award for Private Client Accountancy Firm (large) was won by Tilney Smith & Williamson with BDO and KPMG shortlisted. Tilney Smith & Williamson's very detailed entry provided excellent detail on client service quality and satisfaction, with a very high net promoter score. The submission highlighted clear achievements, including the advantages of the firm's successful merger with wealth manager Tilney). The firm also demonstrated an excellent talent management programme, including graduate, apprenticeship and summer internships.

Private Client Accountancy Firm - Large

Category kindly sponsored by
EFG Private Bank

"We are delighted to have won this award following on from the merger of Tilney and Smith & Williamson at the end of 2020. It validates our position as a pre-eminent firm in the private client world. Receiving an award from *privateclient* very much endorses our credibility as a firm committed to providing clients with a high quality and bespoke service.

"We feel Tilney Smith & Williamson is in a great position to be able to weather recruitment and regulatory challenges. We are very attractive to new recruits given all the opportunities for career development we now present across the enlarged firm and having been very active in hiring new talent over the last year.

"We look to build long-term trusted partnership with our clients. Certainty and clarity in their financial affairs are of paramount importance so that they can sleep at night, knowing their affairs are being well looked after. We also assist them with succession issues. We give a holistic all-round service which is unique given the blend of our investment, financial planning and accountancy services compared to our competitors."



Joss Dalrymple
group head of client services,
Tilney Smith & Williamson



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Private Client Accountancy Firm Boutique

Winner **Rawlinson & Hunter**

Finalists **Buzzacott and
Tax Advisory Partnership**

The 2021 *privateclient* Excellence Awards' Private Client Accountancy Firm (boutique) category was won by Rawlinson & Hunter, who triumphed over shortlisted firms Buzzacott and Tax Advisory Partnership. The Awards' judges praised Rawlinson & Hunter for its thorough submission – with great attention to detail. The firm was also very clear on its achievements over the past year and the submitted case studies highlighted the various processes at the firm.

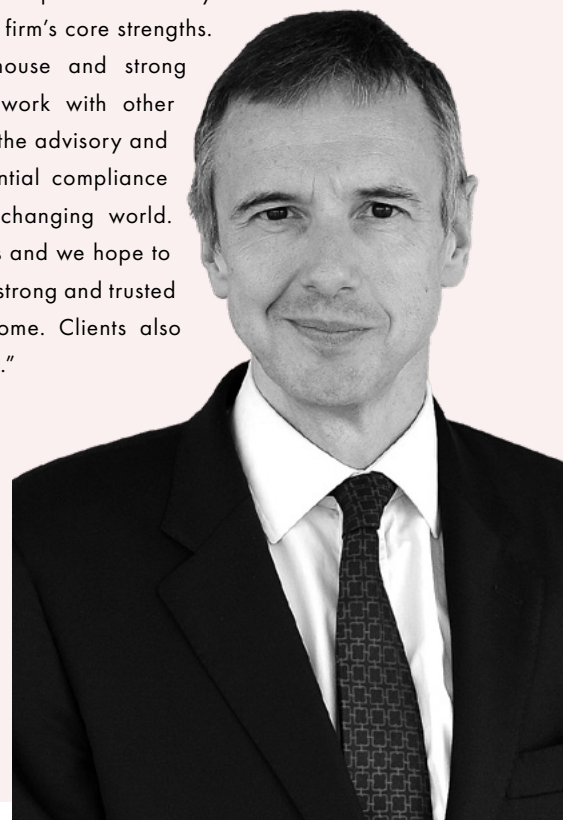
"We are delighted to be recognised by *privateclient* with such a prestigious award and by the sector more widely. To receive the award in 2021 is particularly special since it was in recognition of a period where the firm, its staff and clients were required to respond to specific challenges. It was also very special as this was the inaugural award.

"Rawlinson & Hunter is founded on our service to private clients and the loyal and wide reaching relationships we have created over the years, many of which have continued generation after generation. The private wealth sector is the cornerstone of our business and from it flows a multitude of services making Rawlinson & Hunter the full service accountancy and tax practice it is today.

"We aim to provide the very best service to our clients and to build long lasting relationships. We see the value in supporting clients' wider affairs and understanding the wider implications of any change in circumstance. For many clients we are their trusted adviser, sitting alongside them, their family and, perhaps, their family office. We treat clients like family.

"A clients makes a choice based mainly on trust, ability and relationships. Rawlinson & Hunter has excelled in its technical expertise over the years and this continues to be one of the firm's core strengths. We have dedicated teams in house and strong relationships internationally and work with other professionals to support clients on the advisory and execution, not forgetting the essential compliance which is all too important in a changing world. Most clients come through referrals and we hope to demonstrate our strengths building strong and trusted relationships over the years to come. Clients also benefit from our partner led service."

David Kilshaw
partner,
Rawlinson & Hunter



Investment Consulting Firm Independent

Winner **Asset Risk Consultants**

Finalists **IAM Advisory and
JTFM**

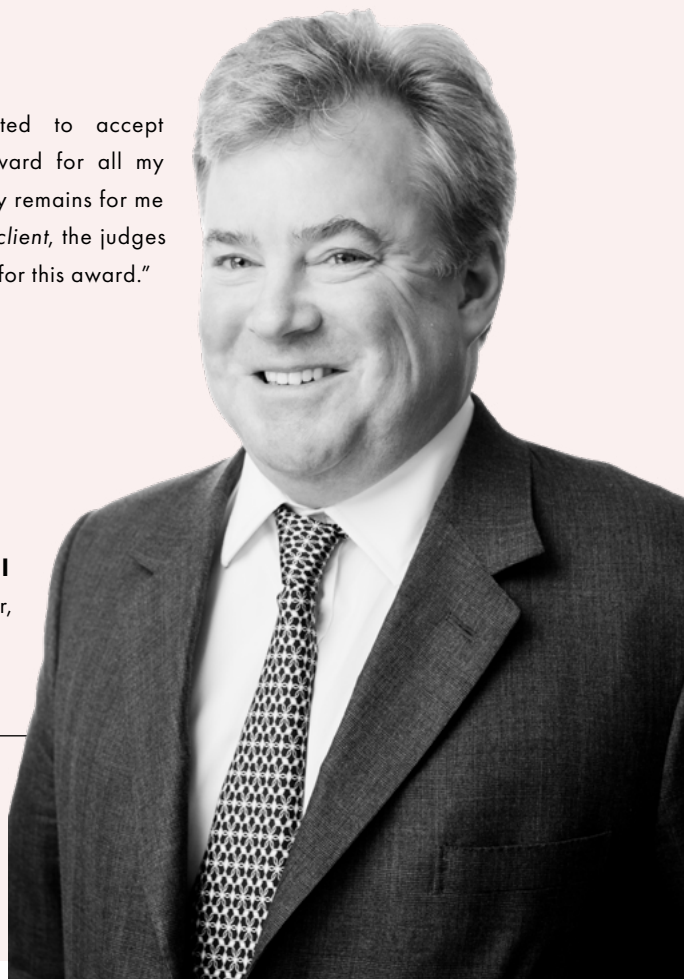
The Investment Consulting Firm (independent) category was won by Guernsey-based Asset Risk Consultants, with IAM Advisory and JTFM shortlisted. Asset Risk Consultants was commended for its innovation to improve client experience, its core focus on ESG (which includes a commitment to plant one tree for every client report produced) and the firm's client centric service provision.

Investment Consulting Firm - Independent

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Veritas Investment Partners

"We are delighted to accept this inaugural award for all my colleagues. It only remains for me to thank *eprivateclient*, the judges and the sponsors for this award."

Andrew O'Neill
managing director,
Asset Risk
Consultants





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Wealth Planning Firm

Independent

Winner **The Private Office**

The Wealth Planning Firm (independent) inaugural winner was The Private Office. The firm's submission was praised for its strong case studies and attention to detail, whilst the panel was impressed to see the firm operated with a fixed fee structure and commended its plan for 25 percent of ownership and future distribution of profits to Restore Our Planet. The firm has a demonstrable focus on staff and their wellbeing, whilst the development of the firm's online proposition has enhanced client experience and the quality of service provided.

Wealth Planning Firm - Independent

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thewealthnet

"Thank you *eprivateclient*, on behalf of all the staff at TPO we are delighted to receive this award. This award reflects on the hard work and dedication of the whole team and the great clients that we work with, that make us the firm that we are."



Stuart Phillips
CEO,
The Private Office

Meet the 2021 eprivateclient Excellence Awards' Judging Panel

James Anderson,

founder and editor-in-chief of PAM Insight

James' publishing career began in 1985 and he started focusing on financial services in 1987, specialising in the field of private wealth management, both in the UK and around the world, from 1990 onwards.

James founded PAM Insight in 1993 and launched Wealth Management magazine in 1997, followed by PAM (Private Asset Managers) and the PAM Awards in 1999. He subsequently launched www.pamonline.com in 2001, thewealthnet in 2002 and eprivateclient in 2003, as well as launching almost 50 annual events in the intervening period for leaders and senior professionals across the wealth management sector.

He also now sits on a number of tech and fintech company boards, both in the UK and Switzerland.

James is chair of the PAM Awards' Judging Panel.



Will Sidery

editor of eprivateclient

Will joined PAM Insight 10 years ago and has since worked his way up from news reporter to editor of eprivateclient.

Through this he has developed an extensive network of private client professionals, from lawyers and accountants to trustees and tax advisers.

Will has an in-depth knowledge of the sector and is always up to date with the latest trends and developments.



Wassyl Abdessemed

research manager at PAM Insight

Having graduated from Kings College London with a Masters degree in Early Modern History, Wassyl joined PAM Insight as an analyst in 2017.

Promoted to research manager in 2019, Wassyl is responsible for compiling the data used in all PAM Insight initiatives, including eprivateclient's firm rankings.



Katie Royals

associate editor of thewealthnet

Katie joined PAM Insight in 2018 as a junior reporter, working across both thewealthnet and eprivateclient. She became a senior reporter in 2019, before she was appointed associate editor in 2021.

Katie's experience working across both news services has given her a holistic view of the private wealth sector, allowing her to hone in on the issues most pertinent to the industry.

Katie is particularly interested in sustainability, diversity and next generation issues.



Methodology

The inaugural eprivateclient Excellence Awards was created to address the changing needs and issues of the industry. For more than a decade, the team at eprivateclient have been producing accurate, carefully researched rankings, to reflect the order of firms across the core private client advisory professions. Tier I ranked firms (and a select number of firms in lower Tiers) makes for a readymade long shortlist of leading contenders for these new Awards.

The eprivateclient Excellence Awards has the provision of solutions at its core. As such it encompasses a broad range of issues including, but not limited to, working with clients to develop an appropriate strategy, next generation issues, the role of philanthropy in a family's plan and the ability to act as the lead adviser.

However the Awards are not just concerned with the breadth and depth of a firm's service offer, but also in how it is delivered to the client. Furthermore the judging panel also look at the values a firm or company hold and how are these implemented and communicated in practice. As well as how a firm or company interacts with the broader community, what they are doing to decrease its negative environmental impact and their approach to their principals and employees, though BAME, D&I, recruitment, social mobility, work environment and job flexibility.

Much like the PAM Awards, the eprivateclient Excellence Awards is proud of the diligence and rigour behind the judging process, and take great pains to ensure that it is robust, fair and transparent. Feedback is prepared for the entrants following the announcement of the winners and finalists, the only Award programme to offer such openness about the rationale behind the decision-making, and on how entrants can improve.

We continue to look for ways to improve the feedback process to ensure it is both constructive and accurately representative of the thought process behind the panel's decision, and can genuinely be used by entrants not only to improve their chances of future success, but also their business and the offering they provide.

The integrity of our own process is under constant scrutiny and we continue to review and address any areas in which we feel improvements can be made.

The feedback received from entrants and judges alike were extremely positive and we hope that many of you will undertake the challenge and enter next year.

The judging panel would like to encourage firms that have not entered in the past to do so in 2022. For more information on the 2022 Awards entry process, please contact Kathryn Stokes, kstokes@paminsight.com



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