



# The eprivateclient **Excellence Awards**

**2022 Special Report**



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Published by PAM Insight Limited  
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Design: Oneiros design.

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# Foreword



Welcome to this special report celebrating the second *eprivateclient* Excellence Awards and the first to be held in person.

The Awards were established in order to recognise and celebrate the leading firms in the private wealth advisory sector in the UK, UK offshore and globally and highlight the achievements these firms have made over the past year.

Based on PAM Insight's PAM Awards, the *eprivateclient* Excellence Awards employ a similar submission and judging process with the only difference being that Tier One firms from *eprivateclient*'s annual rankings form the core list of firms that qualify to enter.

The 2022 awards saw over 30 firms make submissions which saw the *eprivateclient* Excellence Awards Judging Panel nominate 28 firms on the shortlist of finalists and commended firms across 11 Award categories.

This report details the full list of the 28 firms as well as profiles of the 11 winning firms.

Everyone at PAM Insight would like to congratulate and thank all the firms that entered the 2022 Awards and especially thank the Awards' sponsors, without whom the whole initiative would not be possible.



**Will Sidery**

Senior Editor  
PAM Insight



# 2022 eprivateclient Excellence Awards

## Winners & Finalists

### Private Client Law Firm

Full-Service

Winner **Charles Russell Speechlys**

Finalists **Mishcon de Reya**

**Wedlake Bell**

**Womble Bond Dickinson**

Commendation

**Burges Salmon**

### Private Client Law Firm

Boutique

Winner **Turcan Connell**

Finalist **The Burnside Partnership**

### Family Law Firm

Full-Service

Winner **Mishcon de Reya**

Finalist **Charles Russell Speechlys**

Commendation **DMH Stallard**

### Family Law Firm

Boutique

Winner **Burgess Mee**

### Private Client Offshore Law Firm

Multi-Jurisdiction

Winner **Ogier**

Finalists **Carey Olsen**

**Harneys**

### Private Client Accountancy Firm

Full-Service

Winner **EY**

Finalists **BDO**

**Deloitte**

### Private Client Accountancy Firm

Boutique

Winner **Buzzacott**

Finalist **Rawlinson & Hunter**

### Private Client Trust Company

Listed, Bank or PE owned

Winner **Ocorian**

Finalists **JTC**

**Zedra**

### Private Client Trust Company

Independent

Winner **Saffery Champness Registered Fiduciaries**

Finalists **Crestbridge**

**Highvern**

### Investment Consulting Firm

Independent

Winner **IAM Advisory**

Finalists **ARC**

**Delfin Private Office**

Commendation **Altair**

### Wealth Planning Firm

Independent

Winner **The Private Office**

## **Private Client Law Firm** Full-Service

The category with the most entrants was the Private Client Law Firm (large) category, which saw Charles Russell Speechlys named as the 2022 winner. The category saw three finalists - Mishcon de Reya, Wedlake Bell and Womble Bond Dickinson – named and Burges Salmon commended.

The *eprivateclient* Excellence Awards' judging panel recognised that Charles Russell Speechlys had completed a raft of achievements in the last 12 months, having added a new service team to its London office, strengthening its service provision and client experience. The firm also demonstrated its commitment to staff wellbeing and has increased its wellbeing week to a whole month, providing a range of activities to support its staff's mental, physical, financial, social and spiritual wellbeing.

"We've known *eprivateclient* for a long time and worked with the firm for a long time. It's very important for us as a private wealth industry for us to be evangelists, particularly at a time like this where perhaps the concept of wealth is not as popular as it might be. Private capital has an awful lot to tell, and I think if there are any awards which can do something to tell the private capital story then that's worth getting involved in."



**Piers Master,**  
partner,  
Charles Russell Speechlys

Winner **Charles Russell Speechlys**

Finalists **Mishcon de Reya**  
**Wedlake Bell**  
**Womble Bond Dickinson**

Commendation **Burges Salmon**

**Private Client Law Firm - Full Service**

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# Private Client Law Firm Boutique

Winner **Turcan Connell**

Finalist **The Burnside Partnership**

## Private Client Law Firm - Boutique

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The winner of the Private Client Law Firm (boutique) category was Turcan Connell. The judging panel found that Turcan Connell had provided an impressive and comprehensive entry, with detailed case studies that really bought the firm's offering and service provision to life. As well as an admirable approach to charitable fundraising, raising over £27,000 for a charity chosen by its staff, the firm has made particular efforts to address the difficulties faced by staff members, in particular its female employees.



"We're delighted to get this award. We want to grow and maintain. If we can look after our people and bring them through, we can continue to deliver that excellence service to clients both on the technical side and just on the service delivery. Hopefully we will continue to evolve."

**Alexander Garden,**  
Turcan Connell chairman



# Family Law Firm

## Full-Service

Winner **Mishcon de Reya**

Finalist **Charles Russell Speechlys**

Commendation **DMH Stallard**

### Family Law Firm - Full Service

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**Berenberg**

The judging panel said Mishcon de Reya had demonstrated increasing international growth, with an expansion of its presence in Asia through its association with Karas LLP in Hong Kong as well as providing excellent case studies detailing specific achievements over the last year, including an Equality, Diversity and Inclusion committee with a clear strategy to tackle key aspects of gender pay reporting.

"We're absolutely delighted to have received this award. It is very gratifying to have our innovative and multi-disciplinary approach recognised by *eprivateclient* as we never take for granted the privilege we are given in working with so many families and being entrusted with their most personal of concerns.

"This has given us a deep understanding of the dynamics and politics of families, their businesses and their relationships. As each family is unique, with their own complex requirements, this expertise, grounded in many years of experience, has enabled us to deliver creative solutions across a number of disciplines, rather than simply being a traditional "family law" team. Being recognised by *eprivateclient* in this way is a huge honour and something we're incredibly proud of."



**Barbara Reeves,**  
partner, head of family,  
Mishcon de Reya

## **Family Law Firm** Boutique

The Family Law Firm (boutique) category was awarded to Burgess Mee who had particularly impressed the judging panel with the appointment of a fertility officer, emphasising its growing commitment to the wellbeing of its staff members and their families. Furthermore, the firm had launched two initiatives over the past year that have significantly strengthened its service provision to clients.

"It was a real honour and a surprise because we were up against some really impressive competition. The way that the team who were there on the night reacted showed how delighted we were to be recognised like that. We do feel like we're an innovative firm and so to be recognised for that was great."

**Antonia Mee,**  
partner,  
Burgess Mee



Winner **Burgess Mee**

**Private Client Family Law Firm - Boutique**

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# Private Client Offshore Law Firm Multi-Jurisdiction

Winner **Ogier**

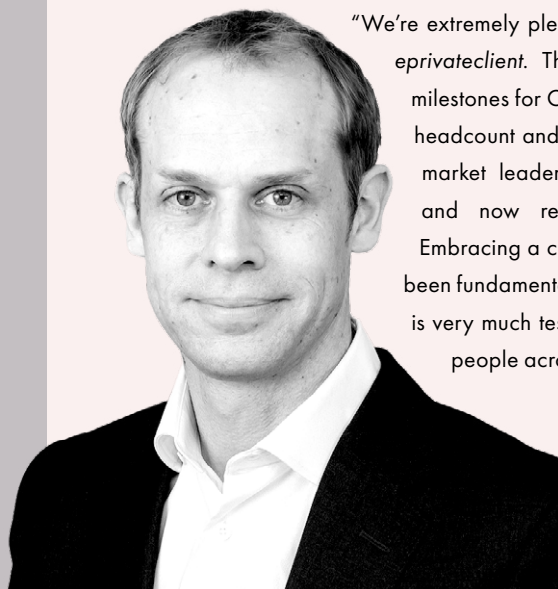
Finalists **Carey Olsen  
Harneys**

## Offshore Law Firm - Multi-Jurisdiction

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**Lombard Odier**

The judging panel found that Ogier stood out as it demonstrated a clear ESG-focus, with the development of a first of its kind online tool designed to help clients understand ESG.

It also launched a new talent management programme in 2021 providing practical experience and knowledge in ESG and its impact to its staff. Alongside this the firm has made many new and internal hires to support this growing and demanding area and is committed to reducing its greenhouse gas emissions by 50 percent by 2030.



"We're extremely pleased to receive this recognition from *eprivateclient*. This has been a year of significant milestones for Ogier, from record-breaking growth in headcount and income, to being recognised as true market leaders by independent legal directories, and now receiving this excellent recognition. Embracing a culture of innovation and inclusion has been fundamental to this success and this achievement is very much testament to the work and talent of our people across the globe."

**Matt Guthrie,**  
partner,  
Ogier



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# Private Client Accountancy Firm Full-Service

Winner **EY**

Finalists **BDO**  
**Deloitte**

The winning firm provided a full and detailed submission, highlighting a raft of key achievements in 2021. Markedly, the integration of Frank Hirth, which significantly enhanced the capabilities of EY's private client team. Furthermore, it has launched a private client academy, a one stop shop for all its staff's learning and development needs.

The firm is also committed to becoming more sustainable. So far, it has eliminated plastic consumables, cutting single use plastic in the work place by 91 percent.

"These awards are really important in the industry and we need to celebrate that. The one team ethos of Frank Hirth and EY really binds us all together in the private group."



**Iain Younger,**  
partner  
EY Private

**Private Client  
Accountancy Firm**  
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## **Private Client Accountancy Firm Boutique**

The Awards' judges found that Buzzacott demonstrated many achievements over the last calendar year, most notably the launch of its family office and probate services, significantly enhancing the client offering and experience.

The firm also reports on its gender pay gap and uses ED&I surveys and forums to provide staff with regular opportunities to raise any concerns they may have. Furthermore, it is committed to supporting charities and raised over £70,000 for its Memorial Fund in 2021.

"We here at Buzzacott are grateful to have won the award. Our firm now offer a combined package of solutions under one roof. This is something that makes us definitely stand out. Ultimately, this offering is what clients are looking for and makes their lives easier."

**Akin Coker,**  
partner & head of private clients,  
Buzzacott



Winner **Buzzacott**

Finalist **Rawlinson & Hunter**

**Private Client Trust Company -  
Boutique**

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# Private Client Trust Company

Listed, Bank or PE owned

Winner **Ocorian**

Finalists **JTC**  
**Zedra**

## Private Client Trust Company - Listed & Bank/PE Owned

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The judges found that Ocorian had clearly articulated its progress during the past year. With new acquisitions, team and office expansions and a 50/50 male/female ratio at director level, this firm is certainly making a significant impact. Furthermore, this firm has a leading learning and development platform enabling continual professional development at all levels.

"We're really delighted to win the award. We hold eprivateclient in very high esteem as one of the credible industry standard bearers, so we made a big deal about it internally and externally. We're very proud of that. What has been a big feature of our business in the last few years has been investment in the business. We will continue to invest in all parts of our business, including private client services."



**Nick Cawley,**  
chair of private client global  
advisory board,  
Ocorian



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# Private Client Trust Company Independent

Winner **Saffery Champness  
Registered Fiduciaries**

Finalists **Crestbridge  
Highvern**

According to the judging panel, Saffery Champness Registered Fiduciaries demonstrated many achievements over the past 12 months. Most notably the firm has made a number of internal job promotions and created new roles, including those at director level, demonstrating its commitment to developing and retaining top talent. Furthermore, the firm continues to contribute to the local community through fundraising activities and has made great steps towards reducing its carbon footprint, and that of its staff.

"Thank you to *eprivateclient* for this award. Two moments stood out to me as emblematic of Saffery's impressive performance this year.

"One was the funding an opening a semi-permanent exhibition in Paris and the other was providing rescue funding to an Islamic art museum in Israel, which was at risk of having to sell off some of its rare pieces.

"Although both related to the firm's work with luxury assets and exotic investments, these examples both demonstrate one of the tenets of the firm's USP – our work on unique, unusual, and often highly complex cases."



**Lisa Vizia,**  
director and head of the family  
office team in Guernsey,  
Saffery Champness Registered Fiduciaries

**Private Client Trust Company -  
Independent**

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The value of an investment and the income from it can go down as well as up and investors may not get back the amount invested.

## Investment Consulting Firm Independent

The judging panel praised IAM Advisory's significant progress, highlighted by its achievements, over the past calendar year. It has created a new digital solution providing clients with a much more bespoke service, with increased options available, overall enhancing the offering available. Additionally, it became a signatory UNPRI and joined the Guernsey Green Finance steering committee, showing its commitment to sustainability.

"IAM Advisory was delighted to win the *eprivateclient* Excellence Award for top Investment Consulting Firm. The award is a testament to the excellence of our approach, the expertise of our professionals and their deep understanding of the investment markets. Our client base continues to grow and we are grateful to the many other professionals celebrated by the *eprivateclient* Excellence awards who continue to recommend us to their clients. Thank you to the *eprivateclient* team and to Lombard Odier for sponsoring this award."

**Michael Strachan,**  
managing director,  
IAM Advisory



Winner **IAM Advisory**

Finalists **ARC**  
**Delfin Private Office**

Commendation  
**Altair**

**Investment Consulting Firm -  
Independent**

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# Wealth Planning Firm

## Independent

The award judges found that it continues to grow successfully, with new clients and over 40 new members of staff. The panel continue to be impressed by the firm's dedication to paying 25 percent of all future capital to Restore Our Planet – an environmental charity. It was also evident that it has worked hard to ensure an almost 50/50 male/female ratio across the firm, as well as developing young talent through its adviser academy."

"Culture is everything, the rest is just detail. It is important to make it fun. We work for a long period of time, so we want to see people enjoy it.

Winner **The Private Office**

**Nigel Yeo,**  
chief operating officer,  
The Private Office



**Wealth Planning Firm - Independent**

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**Lombard Odier**



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# Meet the **2022** 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](http://www.pamonline.com) in 2001, [thewealthnet](http://thewealthnet) in 2002 and [eprivateclient](http://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**  
Senior Editor of PAM Insight

Will joined PAM Insight 10 years ago and has since worked his way up from news reporter to editor of [eprivateclient](http://eprivateclient) before being named as senior editor of PAM Insight in 2022.

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.



**Katie Royals**  
Managing Editor of PAM Insight

Katie joined PAM Insight in 2018 as a junior reporter, working across both [thewealthnet](http://thewealthnet) and [eprivateclient](http://eprivateclient). She became a senior reporter in 2019, before she was appointed associate editor of [thewealthnet](http://thewealthnet) in 2022 and managing editor of PAM Insight later in the year.

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 *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 2023. For more information on the 2023 Awards entry process, please contact Kathryn Stokes, [kstokes@paminsight.com](mailto:kstokes@paminsight.com)



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Over 200 guests from the private client sector attended a black tie gala at the Langham Hotel in London on 7 July 2022 to celebrate the 2022 *eprivateclient* Excellence Awards







Lauren Harzo, client manager, Zedra



Foong Jin Ng, assistant manager, BDO



Jennifer Ollerenshaw, head of wealth planning, UK, Lombard Odier



Mark Stokes, partner, Deloitte



Fella Khelifi-Arnulphy, head of UK advisory solutions, EFG Private Bank

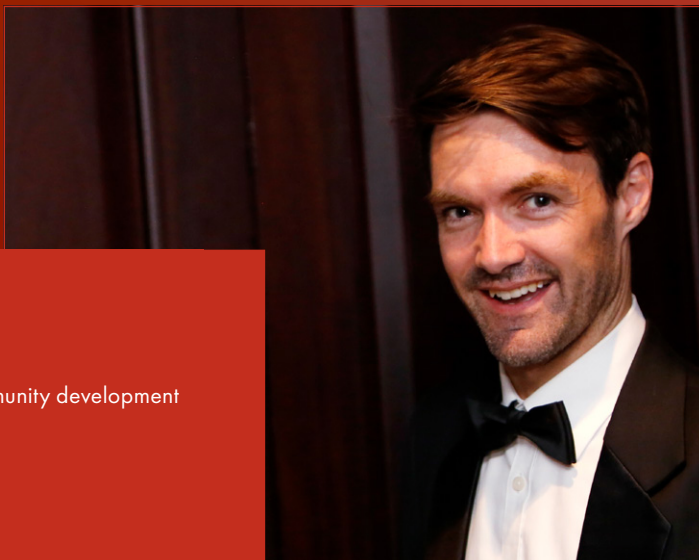




Sophie Voelcker, partner, New Quadrant Partners



Debbie Mahanta, strategic partnerships manager, Octopus Investments



Chris Curtis, community development manager, ARC



Gabrielle Branson, deputy chief executive officer, EFG Private Bank



Simon Evans



Derek Mills, a financial investor & adviser for Derek Mills Wealth Consultancy, a senior partner practice of St James's Place





Paul Kearney, managing director, ARC

James Anderson,  
founder and editor in  
chief, PAM Insight



Barbara Reeves, partner and head of family,  
and Peter Steen, partner, Mishcon de Reya  
and Simon Evans





Duncan MacIntyre, chief executive officer, UK, Lombard Odier and Henry Simpson, senior associate, Ogier



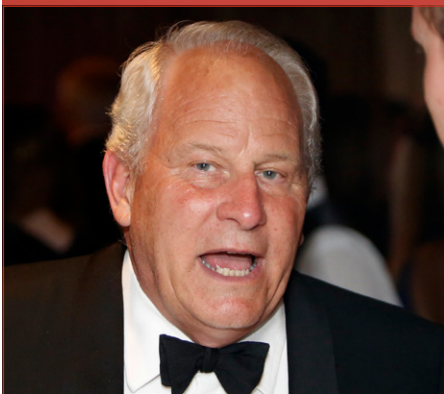
Alex Loydon, director, St James's Place Private Clients, Akin Coker, partner and head of private clients, and Rakesh Dabasia, partner, Buzzacott and Simon Evans



Stefan le Marquand, trust manager, Highvern



Peter Burgess, partner, David Lillywhite, partner, Kirsty Morris, partner, and Natalie Sutherland, partner, Burgess Mee



Michael Strachan, managing director,  
IAM Advisory



Jennifer Main, senior tax manager, Michael Lewis, partner,  
private client services, tax director, and Katerina Prelovskaja,  
tax partner, EY, Gabrielle branson, deputy chief executive officer,  
EFG Private Bank, David Bowen, partner, UK & Ireland family  
office advisory services leader, EY, Ruth Donaldson, partner, EY  
and Simon Evans



Sam Jeffries, partner, Sarasin & Partners,  
Prapa Pearce, executive director, private  
client, Ocorian and Simon Evans



Ben Swarbrick, financial planner, James  
Hambro & Partners and Matthew Gilligan,  
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Caroline Stokell, chief executive officer, Veritas Investment Partners, Michael Strachan, managing director, IAM Advisory and Simon Evans

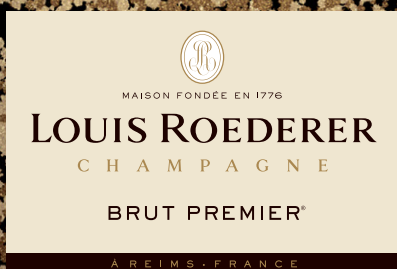
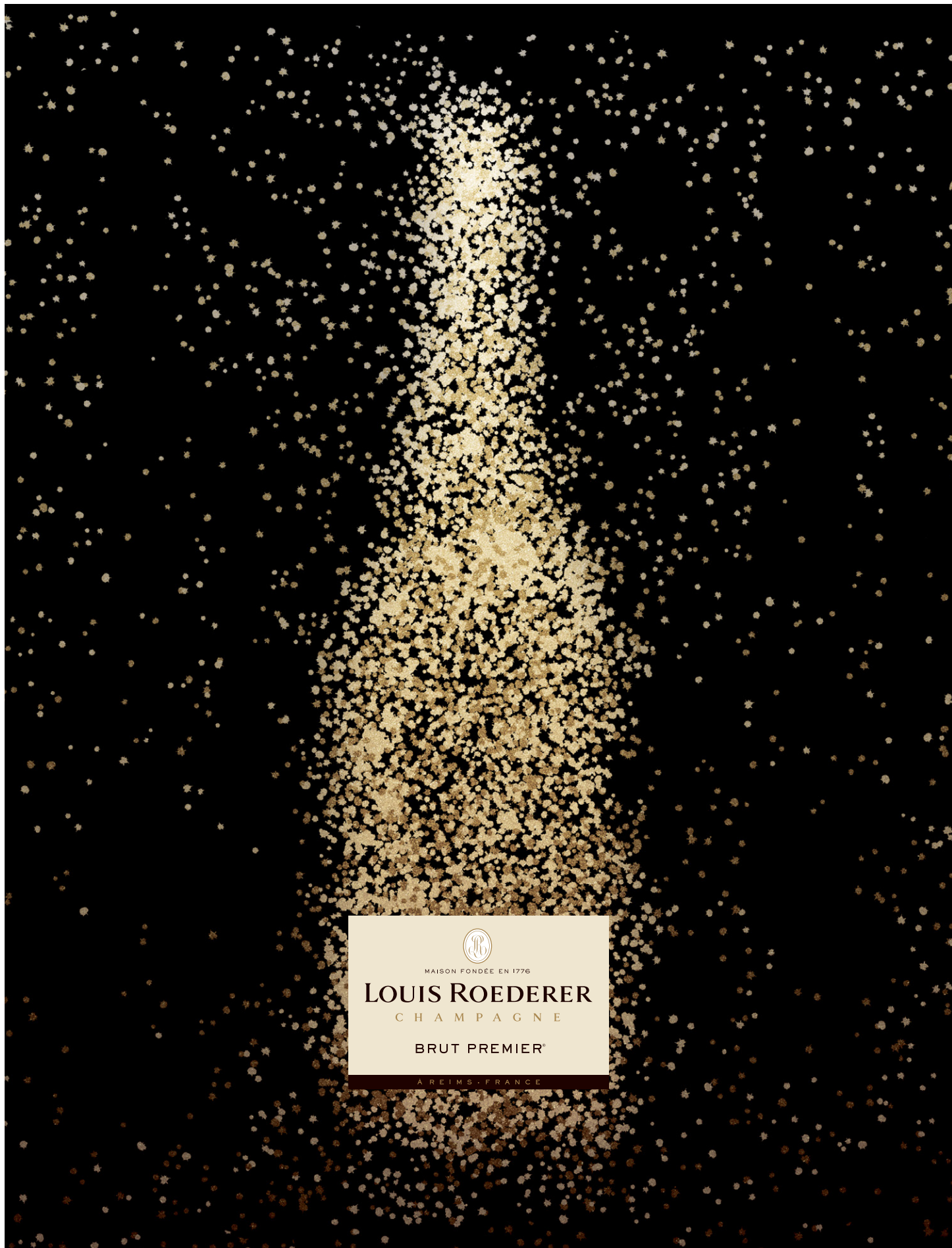


Akin Coker, partner and head of private clients, Buzzacott



Toni Meadows, chief investment officer, Kirsty Stone, chartered financial planner, and David Dodgson, chartered financial planer, The Private Office and Simon Evans





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