

Channel Islands
NextGen
Leaders
2023



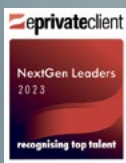
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Brooks Macdonald International are proud to recognise top talent, and sponsor the eprivateclient NextGen Leaders

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Foreword

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elcome to this special report for the inaugural 2023 *eprivateclient* Channel Islands NextGen Leaders initiative.

Congratulations to all 52 Jersey and Guernsey-based individuals listed this year. They represent the brightest and best from the Channel Islands' fiduciary, legal and accountancy sectors.

This annual listing supersedes the *eprivateclient* Channel Islands Top 35 Under 35, which launched in 2018 to compliment the annual *eprivateclient* UK and UK

Crown Dependencies Top 35 Under 35 and ran successfully for five years. We decided it was time to rebrand the initiative, to reflect changing trends in the modern workplace.

As part of the change, we removed the age limit, instead focusing on the number of years of qualified work experience and also removed the cap of 35 men and 35 women making the final list, meaning we are able to recognise any number of individuals, provided they meet the high standards set out in the judging criteria.

Many thanks to Brooks Macdonald for kindly sponsoring and supporting the initiative and congratulations once again to all the individuals named in this year's list.



Will Sidery
Senior editor
PAM Insight

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e are delighted to be partnering with *eprivateclient*'s NextGen Leaders awards. This three-year association will see us jointly celebrating the vision of both our organisations to recognise outstanding Channel Islands-based young professionals.

At Brooks Macdonald International, we understand the importance of supporting the next generation of talent. This is why we operate a number of initiatives that encourage the learning and development of our next generation of leaders, supporting them on their career paths to a bright future.

For example, our investment graduates bring fresh energy, willingness to learn, and new perspectives to our industry and one of the great things about my role is to work with – and be challenged by – our next generation of leaders.

Employees that see themselves as future leaders are an important part of running any business. We can encourage our NextGen Leaders by helping them identify goals that align with their career aspirations, creating an image of a leader that promotes upward mobility alongside integrity.

Integrity in leadership is a powerful character trait and one that should be nurtured because having strong moral principles and doing the right thing is of fundamental importance to maintaining the reputation of financial services both within our organisations and more broadly on the Islands.

Many congratulations to those who have been recognised as our NextGen Leaders this year. Making an impact to clients and the communities in which you work creates enormous value for society, but also for yourselves, demonstrating why you have been recognised as rising stars.



Richard Hughes
Chief executive,
Brooks Macdonald

Channel Islands
NextGen Leaders
2023

recognising top talent



Methodology

The 2023 *eprivateclient* Channel Islands NextGen Leaders is based on PAM Insight's experience and knowledge of which individuals in Guernsey and Jersey are rising stars, and why.

The 2023 *eprivateclient* Channel Islands NextGen Leaders - kindly supported by Brooks Macdonald - was open to nominees from within the private client advisory professions be they private client tax, trust, dispute resolution and family lawyers, accountants, or trustees.

Factors taken into account included the reputation or performance of the company that the nominee works for, feedback from senior executives, trajectory of promotion/business development success and relative years of experience, and active involvement in promoting good organisational culture.

Individuals are listed alphabetically by firm.

Channel Islands NextGen Leaders



Michael Alfano

Senior relationship manager
Accuro Trust (Jersey)

11.5 years' experience

Michael joined Accuro in October 2022 as a senior relationship manager in its UK team. In his role he manages complex affairs facing international UHNW clients. Prior to joining Accuro, he was a senior administration and latterly senior manager at Crestbridge. He has a strong background in the trust environment and being well versed in the particularities of the trust industry. Michael takes a great interest in sustainability and ESG and is a member of Accuro's sustainability and impact forum. His nominator said: "Micheal's emotional intelligence and natural ability to build professional relationships in an approachable way, presents him as a natural mentor to more junior colleagues who approach him daily to seek his guidance".



Courtney Farmer

Relationship manager
Accuro

7 years' experience

Courtney is a relationship manager in Accuro's Jersey office. She started her career in finance in 2016 and joined Accuro in 2020. She previously worked at Intertrust and was most recently a senior administrator at the firm. At Accuro, she assists with the management of a variety of offshore entities including co-investment vehicles, EBTs and private trust structures. Courtney holds a BA in environmental sciences from the University of Waterloo in Canada and an ICSA IFA Level 4 Certificate in international finance and administration. Last year, she completed the Cambridge Sustainable Finance online short course, a course offering insight into the role of finance in creating a more sustainable and resilient global economy, achieving an "outstanding" grade.

Hannah Roynon-Jones

Director
Alex Picot Trust

10 years' experience

In addition to her role at Alex Picot Trust as a director, looking after private trust and company clients, Hannah is also responsible for Jersey personal tax compliance and the company's FATCA compliance and reporting. She has wide experience in UK tax including advising on ATED, non-resident Capital Gains Tax, the non-resident landlord scheme, and UK domiciliary tax regulation. Hannah joined the company in January 2016 after spending over three years in the tax department of EY. Hannah has a BA (Hons) in History & Culture from the University of Warwick and also holds the STEP Advanced Certificate in UK Tax for International Clients. The Jersey Society of Chartered and Certified Accountants (JSCCA) awarded Hannah for achieving the highest mark in The Institute of Chartered Accountants of Scotland final case study exam. She was appointed to Alex Picot Trust's board in October 2020.



Channel Islands NextGen Leaders

Josh joined BDO in the Channel Islands, initially in Guernsey, in 2016 from David Owen in the UK where he was a Chartered accountant. He joined as an assistant manager progressing to manager in 2017 and then senior manager in 2020. Throughout this time, Josh has been responsible for managing and delivering assurance engagements to a wide range of clients, primarily in the private wealth and wider professional services sector. In 2022, Josh took the opportunity to move to Jersey with BDO as a director with a specific focus on leading the wealth management and professional services assurance service offerings to clients within those sectors. As part of this focus, Josh leads assurance solutions across a number of Guernsey and Jersey headquartered global professional services groups leading a team of qualified staff in the Channel Islands. Josh is a recent president and director of Young Business Group, a Guernsey based non-profit organisation providing networking opportunities for members.



Josh Payne

Director
BDO

10 years' experience



Nicola Mauger

Senior manager
Butterfield

17 years' experience



Kirsten Brass

Senior associate
Bedell Cristin

9 years' experience

Kirsten is a senior associate in Bedell Cristin's international private client team. She has nine years of non-contentious private client experience, firstly in Scotland where she qualified as a lawyer and then in Jersey after having relocated to the island in 2017. Kirsten regularly advises professional trustees and high net worth families on all aspects of Jersey trusts, foundations and the related company and commercial law issues. She also continues to build on her corporate offering, advising clients on their associated commercial needs which has included a number of company migrations in and out of Jersey. Kirsten also has significant experience advising families in relation to their local and international estate planning.

Her nominator said: "She is passionate about protecting vulnerable clients and regularly advises in relation to capacity, powers of attorney and delegations. Kirsten is one of only a few lawyers in Jersey who has the breadth of experience to be able to advise clients on their structures and also on the more personal estate planning side".

Nicola has 17 years' experience at Butterfield and was promoted to senior manager at the firm in 2022. Nicola is an active member of the STEP professional association and holds the STEP Diploma and the ICSA Certificate in Offshore Financial and Administration. She is an advocate for her team and recognises the need to provide support and development opportunities to assist them in offering top-class service. Nicola is an active member of STEP and holds the STEP Diploma and the ICSA Certificate in Offshore Financial and Administration. She was named a UK and Crown Dependencies *eprivateclient* Top 35 Under 35 in 2017, 2021 and 2022. Her nominator said: "with a varied portfolio of private clients, Nicola is always commercially minded and responsive to all aspects of the markets that can affect clients. She is recognised as a diligent, highly professional individual who demonstrates exceptional client relationship skills whilst balancing the ever-increasing risk and operational requirements of her role."

Channel Islands NextGen Leaders



Kellie Sherwill

Associate
Carey Olsen

10 years' experience

Kellie is a Guernsey Advocate of the Royal Court and an associate in the dispute resolution and litigation team at Carey Olsen. She advises local and international clients on a wide range of contentious and non-contentious disputes, with a particular focus on private wealth and contentious and semi-contentious trust matters including estate and succession planning. Kellie was called as a barrister of England and Wales in 2016. Upon returning to her native Guernsey, she qualified as a Guernsey advocate and joined Carey Olsen in February 2023. Kellie is a member of The Honourable Society of the Middle Temple. She continues to act as a mentor for Pupil Barristers and students who require advice on the profession and experience of the steps taken to qualify. Kellie also looks to mentor local students with an interest in studying law, most recently having delivered talks to students at the three secondary schools. She is a member of the Guernsey Bar and sits as Membership Secretary of the Guernsey International Legal Association. Kellie sits on a number of committees and undertakes a number of voluntary roles including sitting as a member of the Child Youth and Community Tribunal, trained as a Samaritan and provides Duty Advocate services for Guernsey Legal Aid. Kellie is awaiting confirmation of a date to join a board to assist with legal matters relating to mental health matters.

Pierre Ali-Noor

Senior associate
Carey Olsen

12 years' experience

Pierre is an English-qualified solicitor and barrister (currently non-practising) with a broad advisory and commercial litigation practice, with particular emphasis trusts, fraud and investment disputes. He was a senior associate at Dickinson Gleeson before joining Carey Olsen in October 2022. Prior to joining Dickinson Gleeson, Pierre worked for a number of years in the London office of Herbert Smith Freehills before moving to Jersey in 2016 to join the litigation department of Maurant. Since then, Pierre has been involved in a number of high value and significant cases for both institutional clients and HNWI/UHNW individuals. Pierre is a student member of the Jersey Law Society and a member of the Law Society of England & Wales and Gray's Inn. Outside of work, Pierre is a passionate classic car enthusiast and also enjoys learning about oenology. He speaks passable French, reasonable German and Urdu, all of which he strives to improve whenever possible.



Victoria Grogan

Partner and head of wills & estates team,
Jersey
Collas Crill

19 years' experience

Victoria became a partner at Collas Crill in November 2022. Hired to regroup and relaunch the firm's wills & estates team, feedback is that she "hit the ground running" and is "extremely well connected and well liked". She handles migration to and from Jersey as well as high net worth wills and estates. Prior to Collas Crill, Victoria had worked for Ogier as head of wills and probate, a role she held for two years. She had also spent a decade at rival offshore law firm Carey Olsen. She is a member of the Jersey Law Society Committee for Capacity & Succession, fundraises personally for Parkinson's and professionally works pro bono for local charities.

Channel Islands NextGen Leaders



Joanne Seal

Partner & head of Wills & Estates team
Collas Crill

19 years' experience

Joanne is a group partner in the international private client & trusts team at Collas Crill. Having led an international offshore private client practice for over 10 years, she now heads Collas Crill's Wills & estate and private client services in Guernsey. Joanne specialises in estate planning and advising on inheritance matters, focusing on complex wills for both local and non-resident individuals. She advises on all aspects of estate administration, from undertaking executorships, advising on Guernsey's probate procedures, dealing with intestacies (where someone has died without a will), to preparing instruments of variation and obtaining Guernsey grants of probate and representation. Joanne also acts as the Primary Deputy Registrar of the Ecclesiastical Court of Guernsey which oversees the issuing of documentation such as grants of representation and local marriage licences. One nominator said: "Joanne is hardworking and diligent. She is an excellent listener and the type of solicitor whom you don't have to tell something to twice."



Danielle Cottignies

Director
Crestbridge

9 years' experience

classes, Shari'a compliance criteria and multiple jurisdictional factors. She is also a leader within the business in understanding the risks and opportunities of structures with varying degrees of interest in ESG investment and monitoring requirements. She holds the ICSA Diploma in offshore finance and administration, the CISI Islamic Finance Qualification and has completed the STEP advanced certificates in advising the family business and family business governance. She has also been awarded the Sustainable and Responsible Investment Certificate with CISI and is studying for a Diploma in ESG with the Corporate Governance Institution. Danielle also sat on the Jersey Finance innovation in sustainable finance working party as well as playing a significant role in Crestbridge's group ESG strategy and policy.



Laura Parkes

Director
Crestbridge

18 years' experience

Laura has built a successful career in fiduciary services, most recently over the last eight months as a director within Crestbridge Family Office Services. She is responsible for 18 mid-cap client family office relationships and leads a team who service over 60 entities. She also supports the firm's business development activities and has transitioned the onboarding of three new high profile relationships with a combined assets under management (AUM) of over £100 million. Before joining Crestbridge she previously work at Standard Bank Offshore Trust Company, where she led a team of trust relationship managers administering over 200 trust and company structures providing legacy planning for wealthy African and international based clients. Her dual role there focused on the West African segment spanning across Mauritian and Jersey administration teams, and also supported the trust business development team. Laura is also a full member of the Society of Trust and Estate Practitioners.

Channel Islands NextGen Leaders



Hamish Crake

Associate director
Deloitte

9 years' experience

Previously an *eprivateclient* Channel Islands' Top 35 Under 35 in 2018, 2020, 2021 and 2022, Hamish is an associate director with over nine years' experience at Deloitte in Jersey having joined the accounting and advisory firm in May 2014. Hamish has a masters' degree in mechanical engineering from Edinburgh University and is experienced in giving corporate tax and international tax advice.



Charlotte Elliott

Head of wills & probate
Hawksford

12 years' experience

A qualified English Solicitor with a broad spectrum of experience in the legal and trust industry, Charlotte is responsible for assisting clients with a variety of wills and probate services which include drafting of Jersey and UK wills, applying for local, fast track and foreign domicile probate applications, estate and delegate administration and the drafting of powers of attorney. She has a wealth of experience with clients that have challenging international and cross-border elements to their estate planning. I assist with a diverse range of private client structures with clients who are based all around the world including client relationships that require more complex structuring and seek bespoke arrangements. Together with the wills and probate department at Hawksford, Charlotte has supported the Association of Jersey Charities to launch Legacy Week in the Channel Islands, a campaign to assist and inform the public and raise awareness around leaving legacies and the importance of having a will. The campaign supported many individuals and charities in Jersey to tackle a topic that is often a taboo subject.



Tom Murray

Manager
Entrust

10 years' experience

Named as an *eprivateclient* Channel Islands Top 35 Under 35 in 2021 and 2022, Tom has been working in the offshore financial services industry for ten years. He began his career in 2013 at Capita Assets Services (now Apex Sanne) before moving to Kleinwort Hambros in 2019. Tom joined Entrust in June 2021 as a Manager and he holds a STEP Diploma in International Trust Management as well as an ICSA Diploma in Offshore Financial Administration, which has enabled him to excel in the management and administration of various complex offshore structures for UHNW private clients. One nominator said: "Tom takes pride in investing time in members of the team ensuring they understand tasks they are assigned and Tom is motivated to ensure development and progression of more junior members of staff."

Channel Islands NextGen Leaders



Will Van Neste

Manager
Hawksford

9 years' experience

Will has nine years' experience in the finance industry where he started as a trainee and has worked his way up to manager during this time. Will currently manages a team of administrators in the private client service line, servicing a variety of complex family office, private client, and corporate structures, as well as Jersey charitable, ESG and impact initiatives. Will's client base spans the UK, Jersey, Africa, the Middle East, Asia, and North America. Will has already built a network of intermediaries and personally receives referrals for new business

from intermediaries due to his high quality of service, technical knowledge and ability to build strong lasting relationships. As a result, Will has become the "go to" person for new business and is responsible for the onboarding of new clients for the department. Over the last year, Will has worked on multiple new onboarding cases with the CSS team. One nominator commented: "Will is enthusiastic, motivated and a highly collaborative individual why our expert and collaborative values."



Edward Mehigan

Senior manager
IQ-EQ

12 years' experience

Having spent the previous decade at Dominion in Jersey, Edward joined IQ-EQ in 2021 and is an experienced manager of teams administering private wealth structures used to hold a variety of asset classes. In his role as senior manager, he manages a team of managers and administrators in Jersey responsible for a number of different private wealth trust structures. His primary activity centres around managing the transition of clients from non-domicile to deemed-domicile and ensuring that all structuring is completed in line with tax advice prior to a change in profile occurring.



Lan Broad

Investment research director
IAM Advisory

16 years' experience

Lan was promoted earlier this year to investment research director and the new IAM Advisory senior leadership team. In doing so, she is now one of the core drivers of the IAM client offering. Lan directs the fund analyst research, which she has done so for 16 years as well as now taking on the non-fund

investment research responsibilities. This department allows IAM to provide highly professional advisory services to its private clients. Lan was the driver for several client specific fund research projects at the firm, one of which became a case study in the IAM Advisory winning submission for the

privateclient Excellence Awards 2022. Her nominator said: "she is known for her strong ability to understand, consolidate and act on the wide range of data available on fund manager performance and ability to handle risk, whilst gaining detailed knowledge of fund managers strengths and weaknesses".



Sam Matthews

Associate director
Intertrust

13 years' experience

Sam joined Intertrust in March 2020 as trust manager before being promoted to associate director of private wealth in March 2022. Prior to this, he worked in the Moore Stephens Guernsey office for over two years, first as an assistant manager before quickly asserting

himself as a leader, resulting in his promotion to trust manager in August 2018. Before joining Moore Stephens, he was a senior relationship manager at Concept Private. Sam holds an ACCA qualification in accounting and finance which he acquired in 2016. One nominator said: "Sam Matthews is a highly regarded and leading fiduciary in Guernsey. He has engaged Mourant on several matters this year, which have been technically complex and high valued. Sam is one of the most technical trust professionals that Mourant has the pleasure of working with."

Channel Islands NextGen Leaders



Daniel Priestley
Trust officer
Kleinwort Hambros
9 years' experience

A 2022 *eprivateclient* UK and 2022 Channel Islands Top 35 Under 35, Daniel joined Kleinwort Hambros as assistant trust officer in March 2016. He was promoted to trust officer in March 2019. His responsibilities include tax matters, client queries and requests, distribution, client expectations, and meeting clients and intermediaries. Prior to joining Kleinwort Hambros, he acted as business development administrator at Equiom Group.



Harry Malet de Carteret

Senior manager
KPMG Tax

10 years' experience

Harry is a senior manager with over ten years' experience in Jersey and UK non-resident tax matters. He is a Chartered Accountant (ICAEW) and qualified Tax Technician (ATT), specialising in Jersey tax for individuals and trusts, and UK property tax for offshore investors. He is a committee member on the Jersey branch of the Chartered Institute of Taxation and acts as the CIOT-ATT liaison. Harry splits his time between managing KPMG's Jersey private client and family office portfolio, which broadly involves assisting high value residents, business owners and employees with tax advice and tax returns; and assisting non-UK investors with their UK tax obligations with respect to any income and gains arising from UK real estate. One nominator said: "Harry is very strong technically in the UK and Jersey private client tax space. He has fantastic client relationships and is a great mentor to junior staff. A future leader for sure."



James Tipper

Manager
KPMG Tax

6 years' experience

Based in Guernsey, James has worked at KPMG since 2017 and was promoted to manager in October 2022.

One nominator said: "James works brilliantly with high-net-worth families particularly those moving to the island. He is a brilliant people manager facilitating people development and has brilliant relationships with clients."

Channel Islands NextGen Leaders



Susan Le Gresley

Trust manager
Highvern

9 years' experience

A 2013 *eprivateclient* Top 35 Under 35, Susan took a career break shortly after being named in that year's rankings to concentrate on bringing up two children and acting as business manager for her husband's photography business. She returned to work for her former director at Highvern and has promptly been re-admitted to the Chartered Governance Institute. She has taken on a raft of new responsibilities and has re-entered the world of private wealth at a higher level. She has been at the forefront with six new client take-ons and has proved to be an invaluable resource to those clients who value the experience that she brings from both stages of her career.



Hannah Roynon-Jones

Senior trust manager
Highvern

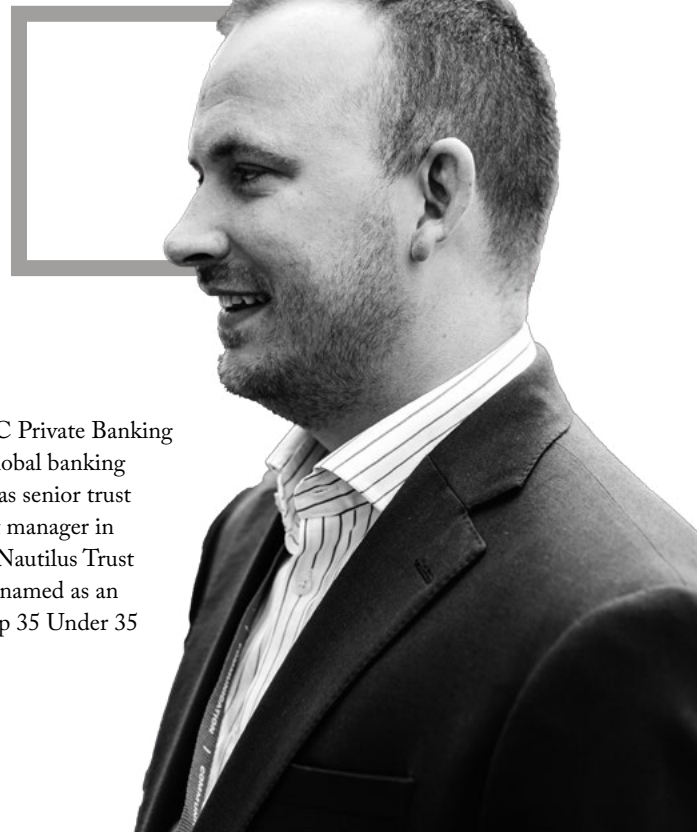
15 years' experience

Billi is a senior trust manager at Highvern's Jersey office, with over 15 years' experience in the industry. She works predominantly with UK and European high and ultra-high net worth clients across a number of different corporate structures. Billi has the ICSA Diploma in Offshore Finance and Administration. One nominator said: "She possesses a rare blend of technical grounding, client experience and level-headedness which make her an asset in complex and fast-moving client situations. She is always focused and accurate, whilst also being willing to discuss the finer aspects of the client wishes to keep an open mind about how the best client solution can be delivered."

James Channing


Trust manager
HSBC Private Banking

12 years' experience



James is a trust manager at HSBC Private Banking in Jersey. He has worked at the global banking giant since 2014 when he joined as senior trust officer and was promoted to trust manager in 2021. Prior to that he worked at Nautilus Trust between 2010 and 2014. He was named as an *eprivateclient* Channel Islands Top 35 Under 35 in 2021 and 2022.

Channel Islands NextGen Leaders

 **Jenny Godel**
Assistant manager
IQ-EQ

12 years' experience

Promoted to assistant manager in July 2022, Jenny joined IQ-EQ in Jersey as a senior trust officer in 2015, when it was known as First Names Group. Before that, she worked as a trust officer for Vistra and began her career in 2011 at Seymour Trust Company. Jenny holds a BSC in biology from the University of Exeter. Jenny was named as an *eprivateclient* Channel Islands Top 35 Under 35 in 2021 and 2022.



Joshua Allaway

Manager
JTC

10 years' experience

Joshua manages a portfolio of high-net-worth international and corporate clients across various sectors. He also has experience in financial risk, pension funds, and retirement planning. Joshua holds a diploma in international trust Management and is a member of STEP. He joined JTC in 2019 as assistant manager before being made manager at the start of 2022. Prior to this, he held the role of senior trust officer for Osiris Corporate Solutions in Mauritius.



Paul Russell

Manager
JTC

9 years' experience

Paul started his career at Minerva in 2014 as an assistant trust officer working in the private client team. He was identified as having drive and ambition, and was quickly promoted to a trust officer where he was given a portfolio of clients. Paul showed his passion for the business whilst working with these clients and was given more complex structures to administer as his knowledge of the industry increased. When JTC acquired Minerva, Paul adapted well and continued to impress both old and new colleagues. Paul was subsequently promoted to senior trust officer, and his portfolio now includes some of JTC's more complex structures. He has built many relationships with clients, intermediaries and the senior management team within the business. Paul has recently been promoted to manager within JTC's private client services division, and he oversees the development of the assistant trust officers in the department. He has also assisted with recruitment and has acted very professionally when having to hold difficult conversations with employees.



Shannon Renouf

Assistant manager
JTC

9 years' experience

Shannon works within JTC's private client services division in Jersey. She is responsible for a number of challenging cases where she has developed a good working rapport and excellent service delivery. She plays an important role in JTC's welcoming committee, acting in a 'buddy' capacity, as well as a 'champion' for the division in terms of project roll outs and system changes. Shannon graduated from the University of Portsmouth in July 2014 with a 2:1 in Sport and Exercise Science and is currently studying towards the Chartered Governance Qualifying Programme. One nominator said: "Shannon is a real asset to JTC and with her positive attitude and approach to service excellence, she will undoubtedly have an excellent career ahead of her. She is very approachable and is professional in her dealings with both colleagues and intermediaries. She derives satisfaction from supporting junior members of the business as well as her peers."

Channel Islands NextGen Leaders



Ben Schofield

Associate director
Maples Fiduciary Services

15 years' experience

Having recently joined The Maples Group as an associate working primarily in the private client business, Ben's experience spans wealth management, corporate, family office and trust structures, including investments in UK residential and commercial real estate. He previously worked at Crestbridge having joined the firm in 2021 from VG where he was a manager and was named as an *eprivateclient* Channel Islands' Top 35 Under 35 in 2018. Mr Schofield joined VG in 2014 and has worked in the sector for over 15 years. A recent achievement of his outside of work include running the 2023 London marathon in a time of 2 hours and 47 minutes. Ben is also aiming to run the Jersey marathon in October 2023 to raise further funds for local charities.



Alexander Hawkins

Senior associate
Mourant

8 years' experience

Alexander is a senior associate in the private client and international trusts practice of Mourant in Guernsey. He provides advice to trust companies, international families and high net worth individuals (HNWs) about wealth structuring and asset protection. He also provides advice in relation to contentious and non-contentious trust and succession matters. He joined Mourant Ozannes in 2020, having previously practised as a solicitor in Australia for Cooper Grace Ward. He is also a member of the Guernsey International Legal Association, Queensland Law Society, and Society of Trust and Estate Practitioners. In 2023, Alexander has chaired a session at Mourant's Channel Islands Trust Forum and also participated in the We Are Guernsey roadshow in London. Away from work, Alexander participates in his firm's touch rugby team, and he again ran the Guernsey marathon this year on behalf of the firm.



Chiara Mundy

Senior associate
Mourant

10 years' experience

Chiara is a senior associate in Mourant's international trusts and private client practice in Jersey. Chiara started her career at the firm back in 2009 in a non fee-earning role. She completed her law degree whilst working full time at Mourant, picking up invaluable fee-earning experience along the way. Chiara was admitted as a solicitor of the Royal Court of Jersey in November 2018 and now holds over ten years of experience working on private client matters. In the last year, Chiara has been heavily involved in large number of the Jersey office's non-contentious highlight matters. Chiara has also undertaken a client secondment at a multinational financial services company and received overwhelmingly positive feedback on her performance during that time. She also enjoys supervising and being the main point of contact for bursary and work experience students.

Channel Islands NextGen Leaders



Kim Neeson

Senior associate
RBC Wealth Management

11 years' experience

Kim joined RBC Wealth Management after leaving school nearly 11 years ago. Starting her career as an administrator, Kim has since been promoted five times. One of these roles saw her seconded to the Cayman Islands for six months, where she worked as a trust officer. Most recently, Kim was promoted to manager/senior associate in Jersey. Kim was also named as an *eprivateclient* Top 35 Under 35 in 2022 and a Channel Islands Top 35 Under 35 in 2021 and 2022.



Nick Abbott

Associate director
New Street Management

10 years' experience

Nick is an associate director at New Street Management which he joined in 2018 as assistant trust manager before being promoted to manager in 2019 and associate director in January in 2022. His responsibilities include managing portfolios for private clients and corporate structures, particularly in the MENA jurisdiction. He also has experience in business development. He has been involved in property transactions such as residential, commercial, warehouses, hotels, developments, and student accommodation. Prior to this, he was senior executive at RBC where he spent almost three years in its trust and client relationships team.



Lydia Emery

Senior associate
Oben

11 years' experience

Lydia joined Oben Law as a senior associate in July 2022 after almost five years at Bedell Cristin in its international private client team. Lydia qualified as an English solicitor in August 2017 and has since gained considerable experience in the offshore trust and corporate sectors. She has accrued a broad experience advising on the establishment and ongoing operation of trusts, foundations, private trust companies, family companies and other private wealth structures. Since joining Oben Law in July 2022, Lydia has broadened her practice and uses her non-contentious experience to advise professional trustees, intermediaries and private clients on litigious matters. She is one of the few private client lawyers in Jersey with experience in both the non-contentious and contentious spheres. Lydia also plays a valuable role in business development and networking. She currently sits on the Jersey STEP committee and is keen to work with other private client advisers to promote Jersey's trust industry. Her nominator said: "Lydia's high-quality work on complex and sensitive matters is a clear sign of her future success to come".

Channel Islands NextGen Leaders



Mellissa Morris

Manager
Ocorian

14 years' experience

Mellissa joined Ocorian's private client team in May 2021 and looks after clients with a diverse asset base, which includes substantial investment portfolios, trading entities in Australia and New Zealand and flagship marquee London properties. Her role consists of looking after a portfolio of clients in a number of jurisdictions with a range of asset classes. Mellissa's primary focus is to build strong working relationships with clients and intermediaries with the aim of working together to achieve the best outcome. She passed the STEP Diploma examination and has recently obtained the diploma in CMI Management level. Mellissa was named an *eprivateclient* Channel Islands Top 35 Under 35 in 2018 and 2022.



Danielle Van Neste

Manager
Ogier

10 years' experience

Danielle is a manager within the Ogier global private wealth team in Jersey and is a qualified Chartered Secretary and an associate of The Chartered Governance Institute (ICSA) after graduating in 2021. She has experience with UHNW individuals and families, administering a variety of structures including trusts, companies, foundations and private trust companies holding a diverse range of assets including investments, commercial and residential property, yachts and works of art. One nominator said: "Danielle is an experienced trust and ICSA professional who is set to have a great career in the industry - her client skills and knowledge are excellent and she has developed a great BD network over the last few years. She is highly regarded in the industry and among her peers."

James Angus

Partner and head of wills & estates team, Jersey
Collas Crill

19 years' experience

Victoria became a partner at Collas Crill in November 2022. Hired to regroup and relaunch the firm's wills & estates team, feedback is that she "hit the ground running" and is "extremely well connected and well liked". She handles migration to and from Jersey as well as high net worth wills and estates. Prior to Collas Crill, Victoria had

worked for Ogier as head of wills and probate, a role she held for two years. She had also spent a decade at rival offshore law firm Carey Olsen. She is a member of the Jersey Law Society Committee for Capacity & Succession, fundraises personally for Parkinson's and professionally works pro bono for local charities.



Jodie Travers

Associate director
Praxis

10 years' experience

Jodie is an associate director of Praxis in Guernsey. She oversees the day-to-day management of a focused team of administration professionals. A member of The Chartered Governance Institute (CGI), Jodie has over 10 years of experience within the Guernsey fiduciary sector, establishing and managing wealth management structures and relationships across various asset classes for high-net-worth individuals, their families, corporate clients, and institutional clients. Jodie has particular experience managing structures with an emphasis in real estate and private equity investments as well as structures for foreign-domiciled UK clients and private clients with a tax connection to the US. She has worked alongside preeminent international wealth advisers on cross-border planning issues and this experience assists Jodie in working with private clients and their legal counsel to set up appropriate wealth management structures.



Declan McArdle

Senior manager
R&H Trust Co

9 years' experience

Declan joined R&H Jersey as tax manager in 2016. He is responsible for drafting tax advice for structures and individuals, tax returns for trusts and companies in the UK and Jersey, advising on UK tax consequences with an offshore perspective, tax compliance, and other tax matters. He works with both HMRC and Revenue Jersey. Declan began his career as a temporary fund administrator for R&H Fund Services before working as a legal assistant for McMillan Williams and administrator at Cosine. He graduated from the University of Brighton with a degree in Law. He holds a diploma in tax and estate planning with STEP and is a chartered tax adviser of the Chartered Institute of Taxation.



Tom Strawbridge

Director
Praxis

17 years' experience

Promoted to director in January 2023, Tom began his career in the offshore financial services industry in 2006 with Fairbairn Trust, working as a trainee trust and company administrator. Tom has worked for PraxisIFM for 12 years and is head of the client administration teams, within private wealth & corporate services. The teams administer and manage a wide range of complex trust and company structures for high-net-worth individuals. Tom qualified as a full member of the Society of Trust and Estate Practitioners in 2012 and in 2017 he successfully completed the ILM Level 5 Award in Leadership and Management. In his spare time Tom plays football and golf.

Channel Islands NextGen Leaders



Peter Brooks

Partner
R&H Jersey

15 years' experience

Named as an *eprivateclient* UK Top 35 Under 35 in 2020 and as a Channel Islands Top 35 Under 35 in 2018, 2019 and 2020, Peter joined R&H Jersey in 2016 to lead the firm's investment manager review team and was appointed a director of R&H Trust Co (Jersey) in 2020. He then was promoted to partner at the start of 2023. In addition to undertaking responsibilities on a number of regulated and unregulated boards, Peter and his team provide investment consultancy services to R&H Jersey's private client services team and clients. Prior to joining R&H, he worked as an investment consultant for Coutts from 2011 until 2016 and before that was a quantitative research specialist at Ermitage Group from 2008. He has a degree in mathematics from the University of Oxford and is a CFA charterholder. In 2023, Peter joined the PAM Awards judging panel as a sub-committee member of the total wealth service & private market access UHNW category panel.



Matthew Gilligan

Associate director
Saffery Champness Registered Fiduciaries

16 years' experience

Matthew has 16 years' experience in the finance industry and joined Saffery Champness Registered Fiduciaries from Louvre Trust where he managed complex and multi-jurisdictional family structures. Matthew works closely with our fiduciary teams assisting in providing bespoke offshore solutions for UHNWIs across a range of jurisdictions. He also has a focus on business development for the firm, helping to expand its reach and unlock new market opportunities for the fiduciaries business. Matthew has been a regular constituent of the UK and Channel Islands *eprivateclient* Top 35 under 35 listing over the years. A nominator said: "Matt is an incredibly kind and warm person to be around. He is a very good connector within the private wealth world. Not only is Matt very personable, he is an expert in what he does professionally. He's always the first person I go to for expert knowledge on trusts and estates, to crypto and NFTs. I'm comfortable putting Matt in front of my professional acquaintances, as well as clients".



Simon Ricketts

Trust manager
Saffery Champness Registered Fiduciaries

8 years' experience

Simon left a role as a senior leader in education in the UK to start a fiduciary career in Guernsey at the age of 34, in 2015. He joined Saffery Champness in a team responsible for a group of five connected families which collectively represent the largest client group, by fee income and asset value, of any of the offshore offices. With his promotion to manager in January 2023 he has now taken on the management of this client group. Simon passed his STEP Certificate in International Management with 83 percent, which was the highest mark in that sitting in Guernsey. One nominator said: "Simon's dedication to his role, and proven expertise, mean that he has come to meet the high threshold of being seen as a respected and trusted advisor by the clients. Simon's attention to detail and ability to understand regulatory issues has proven invaluable over the last year, where increasing sanctions have had a considerable impact on the management of the clients' wealth structures and assets."

Channel Islands NextGen Leaders

 **Chloe Loeser**
Associate director
Sequent

11 years' experience

Chloe has been an associate director for financial planning firm Sequent since October 2021 and was named as an *eprivateclient* Channel Islands Top 35 Under 35 in 2022. Before she joined Sequent, she worked at RBC in Guernsey for over nine years from 2012 and was most recently a trust associate at the bank-owned trust business. She studied at the psychology university of Plymouth and was also awarded with a STEP Diploma in January 2014.



Sanmari Crous

Business development manager Standard Bank

9 years' experience

Sanmari is a South African qualified lawyer and certified financial adviser. She joined the Jersey office of Standard Bank's international fiduciary services team as a business development manager in March 2022, with the dual responsibility of raising the company's profile and assisting with the company's corporate governance and reporting. She is responsible for drafting thought-leadership articles, creating technical marketing collateral, working closely with its marketing team to coordinate its marketing efforts and working closely with the local board. Before joining Standard Bank, Sanmari worked as a lawyer for offshore law firm Hatstone in its Jersey office. Sanmari holds a BComm LLB degrees from the University of Stellenbosch, South Africa, a post-graduate diploma in financial planning from the University of Free State, and a STEP professional post-graduate diploma in private wealth advice.

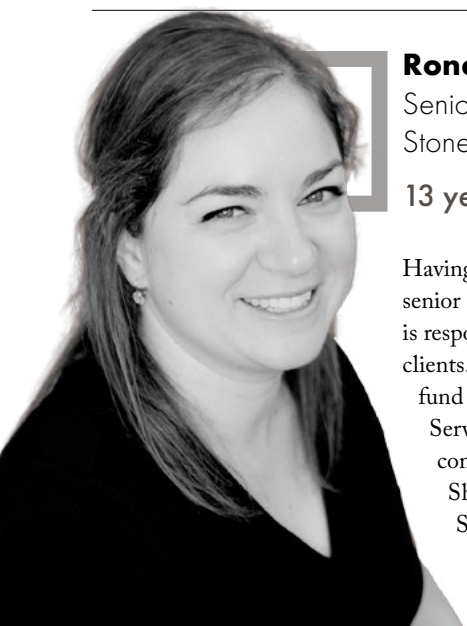


Jade Fellowes

Associate director
Suntera Global

13 years' experience

Jade was promoted to associate director in early 2023 and is responsible for the day-to-day management of a team who administers private client and corporate structures for ultra-high-net-worth individuals and institutional investors, with a real focus on building and maintaining long-lasting relationships. She has worked at Suntera since 2021, having previously worked at Praxis. Prior to this she spent almost ten years at JTC. She is relocating to the UK, where she will be managing director of the office it is opening later this year.



Ronel van Eeden

Senior associate
Stonehage Fleming

13 years' experience

Having worked at Stonehage Fleming since 2018, Ronel is a senior associate in the firm's Jersey family office division and is responsible for a number of international high-net-worth clients. She moved to Jersey in 2014 and worked as part of the fund accounting teams at State Street and Aztec Financial Services. While working at Stonehage Fleming, Ronel completed a Diploma in international trust management. She is now a full STEP member and has completed the STEP Advanced Certificate in UK Tax for international clients.

Channel Islands NextGen Leaders



Tommy Ling

Trust officer
VG

3 years' experience

Tommy joined VG as a trainee in September 2020 having spent seven years in corporate travel management where he gained experience in dealing with both corporate and private clients. He was quickly promoted to trust administrator in May 2021. The following year saw Tommy being listed as an *eprivateclient* Channel Islands Top 35 Under 35 before being promoted to trust officer in 2023. Tommy looks after a diverse portfolio of clients in the wealth structuring team at VG. Tommy has earned the STEP Advanced Certificate in Administration of Estates (E&W).



Chris Ward

Trust manager
Zedra

10 years' experience

Chris joined Zedra in 2013 as an assistant trust administrator after finishing A levels at De La Salle College. Since starting at Zedra, Chris has been promoted to trust manager and is STEP qualified. He has worked on a number of Zedra's key clients across multiple jurisdictions and has built very strong relationships with those clients over the years. The portfolio's Chris has worked on have been varied ranging from family trusts to managing special assets including aviation, marine and artwork. Chris recently played a key role in organising and chairing board and committee meetings for a multi-jurisdictional board of directors for a start-up business and has received great feedback from the work to date. He has also been the key point of contact for ATED for the Jersey office to ensure all returns are filed ahead of the deadline and any liabilities are settled. Chris has mentored a number of colleagues throughout his time at Zedra and he has recently taken on the added responsibility of managing a team. Chris is a member of the firm's environment committee and has helped Zedra grow its global green team across the firm's different offices and assisted with the Jersey office's rewild project with Durrell to achieve carbon neutral status. He has also organised tree planting and maintenance days with the National Trust.



Daniel Gallichan

Trust manager
Zedra

12 years' experience

Dan joined Zedra – then known as Barclays Wealth Trust Company – in 2011 as part of the Advanced to Work Scheme on work placement. Dan excelled within the work placement and showed his dedication and commitment to a career within private clients, which led him to secure a permanent position within Barclays. Since then, he has been promoted various times and become a member of STEP. Following the acquisition of BNP Paribas Trust Company by Zedra, Dan was selected to head up the new private

client team as manager in order to ensure a smooth, seamless integration into the wider Zedra business. Dan is a member of Zedra's CSR committee. In this role, he is part of a committee who's aim is to promote of the business' chosen charities, and organise fund raising events. Like many people, Dan is environmentally conscious, particularly given his involvement in Motorsport. Dan is signed up to an initiative called Carbon Positive Motorsport. The aim of CPM is to offset the carbon emissions generated by each competitor's participation in motorsport, plus 25 percent. This is achieved through various environmental and rewilding programmes throughout the UK. To take part in the scheme, competitors pay an annual fee based upon the number of events they take part in each year. Dan also promotes the initiative by carrying advertisement decals on his race car.

Channel Islands NextGen Leaders

On Wednesday 12th July, *eprivateclient* hosted a champagne reception, which was kindly supported by Brooks Macdonald. The event brought together representatives from the 2023 *eprivateclient* Channel Islands NextGen leaders list, as well as prominent private client professionals from the legal, trust, and accountancy sectors.



Channel Islands NextGen Leaders

Courtney Farmer, Relationship Manager, Accuro Fiduciary & an *eprivateclient* Channel Islands NextGen leader



Declan McArdle, Senior Manager, R & H Trust & an *eprivateclient* Channel Islands NextGen leader



Richard Hughes, Chief Executive Officer, Brooks Macdonald

Channel Islands NextGen Leaders



Danielle Van Neste, Manager, Ogier Global Private Wealth & an *eprivateclient* Channel Islands NextGen leader



Victoria Grogan, Group Partner, Collas Crill & an *eprivateclient* Channel Islands NextGen leader



Carl Duncan, Assistant Relationship Manager, Accuro Fiduciary

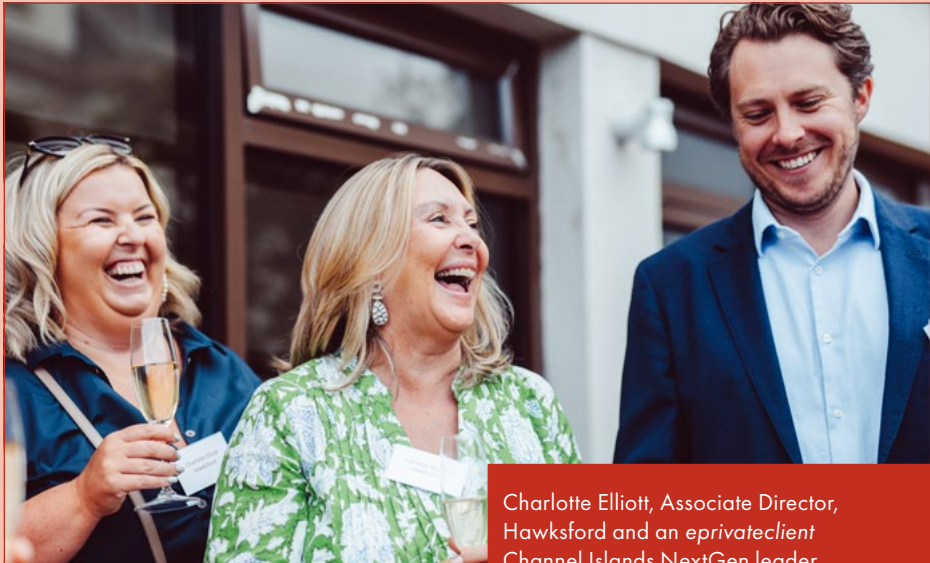
Rudi Bodenstein, Partner, Richard Stride, Partner, Cora Binchy, Partner and Ronel van Eeden, Senior Associate & an *eprivateclient* Channel Islands NextGen leader Stonehage Flemming



Channel Islands NextGen Leaders



Hannah Roynon-Jones, Director, Alex Picot Trust & an *eprivateclient* Channel Islands NextGen leader



Charlotte Elliott, Associate Director, Hawksford and an *eprivateclient* Channel Islands NextGen leader, Lorraine McPhail, Wills & Probate Administrator, Hawksford and Will Van Neste, Manager, Hawksford, and an *eprivateclient* Channel Islands NextGen leader



Daniel Priestly, Trust Officer, Kleinwort Hambros & an *eprivateclient* Channel Islands NextGen leader



James Channing, Assistant Trust Manager, HSBC Private Banking & an *eprivateclient* Channel Islands NextGen leader



Mellissa Morris, Manager, Ocorian & an *eprivateclient* Channel Islands NextGen leader

Channel Islands NextGen Leaders



Danielle Cottignes, Director, Crestbridge Family Office & an *eprivateclient* Channel Islands NextGen leader



Susan le Gresley, Trust Manager, Highvern & an *eprivateclient* Channel Islands NextGen leader



Tom Murray, Manager, Entrust & an *eprivateclient* Channel Islands NextGen leader and Michael Alfano, Senior Relationship Manager, Accuro Fiduciary & an *eprivateclient* Channel Islands NextGen leader



Kirsten Brass, Partner, Head of International Private Client, Bedell Cristin & an *eprivateclient* Channel Islands NextGen leader



Josh Payne, Director, BDO & an *eprivateclient* Channel Islands NextGen leader

Channel Islands NextGen Leaders



Shelley O'Shanunessy,
HSBC Private Banking



Isabelle Russell, Associate, Bedell Cristin



Alex Nardone, Business Development
Director, Jersey Brooks Macdonald



Billi-Jean Brown, Senior Trust Manager,
Highvern & an eprivateclient Channel
Islands NextGen leader

Channel Islands NextGen Leaders



Sanmari Crous, Business Development Manager, Standard Bank Group & an *eprivateclient* Channel Islands NextGen leader



Laura Parkes, Client Service Director, Crestbridge & an *eprivateclient* Channel Islands NextGen leader



Jade Fellowes, Associate Director, Suntera & an *eprivateclient* Channel Islands NextGen leader