

**Private Client  
Practitioner**

Events



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February 2011

**top 25**  
most admired companies

**top  
25**  
Law Firms

**top  
25**  
Accountancy  
Firms

**top  
25**  
Trust  
Companies

**top  
25**  
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## Foreword

Welcome to the special report celebrating the *Private Client Practitioner* Top 25 Most Admired Companies.

The *Private Client Practitioner* Top 25 Most Admired is the culmination of our Top 25 rankings of private client firms within the UK, and the Crown Dependencies, published early last year.

The Top 25 Law Firms, Accountancy Firms, Trust Companies and IFA Companies were all based on empirical data, which established who were the biggest and best within their sector. The Top 25 Most Admired however, shows which of these firms are most highly rated by their peers and the wider wealth management profession.

The Top 25 Most Admired Companies is made up of firms from across the four professions initially ranked. This shows that excellence can be found in all areas of private client work, as well as both the UK onshore and offshore communities.

These are the firms that shape the private client professions and drive forward improvements in the way clients are served.

Competition for the accolade was fierce, so it is a real achievement to make it onto the final list. I would like to congratulate the firms that have been named as the most admired. This is recognition of their professionalism and client service

Tristan Blythe  
Group Editor,  
PAM Insight



Sarasin & Partners are delighted to sponsor the Top 25 Most Admired Companies. We congratulate everyone concerned on their endeavours. We all aim to achieve excellence in our particular field of specialisation. By doing this we can then work with specialists from other fields to obtain the best overall wealth management solutions for our clients. The requirements of our clients are rapidly changing in line with economic circumstances, changing legislation as well as family and personal commitments. It is our constant endeavour as a community to respond to these challenges on behalf of our clients in a timely and proactive manner, but it is not easy!

At Sarasin & Partners, our expertise is in investment management. We manage £12.5 billion for private clients, trusts, charities and pension funds using all the major asset classes and drawing extensively on our global research capability. Many of our clients are also advised by the companies that have been recognised in the Top 25 Most Admired. We are pleased to have established links with these companies and look forward to exploring avenues with the others in order to fulfil our clients' overall objectives.

We wish everyone continuing success.

Lucinda Harris  
Partner,  
Sarasin & Partners



*Please note that the value of shares and the income from them can fall as well as rise and you may not get back the amount originally invested. This can be as a result of market movements and also of variations in the exchange rates between currencies. Sarasin & Partners LLP is authorised and regulated by the Financial Services Authority.*

## Methodology

The Top 25 Most Admired Companies began with an open call for nominations on [www.eprivateclient.com](http://www.eprivateclient.com) and sister website [www.thewealthnet.com](http://www.thewealthnet.com). All

100 firms that had been ranked, using empirical data, as part of the Top 25 series of rankings for law firms, accountancy firms, trust companies and IFA companies were eligible for nominations. Once the period was over the final list of the Top 25 Most

Admired was drawn up. The judging process took into account both the quality and quantity of nominations as well as PAM Insight's extensive knowledge of the private client professions and wider wealth management sector.

### Appleby

Tim Faires  
group head -  
private client &  
trusts, partner,  
Appleby



Appleby, a provider of offshore legal, fiduciary and administration services, opened a new office in Guernsey in the first half of 2010.

The group now has a total of 81 partners, 215 lawyers and over 800 staff divided between 12 offices worldwide.

Timothy Faires, group head, private client & trusts, partner, Appleby, feels that the firm is "admired" for its "unique global footprint".

"We are the only offshore firm to offer service not only in eight key offshore jurisdictions.

"This illustrates our capacity to offer clients unparalleled access to legal, fiduciary and administration services within multiple jurisdictions from which to facilitate their international deals and transactions."

Mr Faires added: "Although Appleby lawyers and professional specialists are capable of providing more expertise for certain services in particular jurisdictions, this knowledge is easily translated to other jurisdictions, where we have the local knowledge for dealing with the legal, regulatory and cultural challenges. As a result, Appleby is able to advise global public and private companies, financial institutions and high net worth individuals, working with them and their advisers to achieve practical solutions, whether in a single location or across multiple jurisdictions."

Gerry Williams,  
chief executive,  
Ardel



Formally Bachmann Group, the firm rebranded to Ardel Holdings in August 2010 as part of the management buyout process, which has seen around 40 of its senior management team become shareholders in the trust company.

Chief executive of Ardel, Gerry Williams said that whilst the change in identity is "essential" to take the company forward, "continuity and the ongoing provision of client service are paramount".

### Ardel Trust

He added: "Following the MBO our goal is to grow the business through acquisitions and expansion into new jurisdictions in 2011. We believe that we are well placed to take advantage of what we see as significant opportunity in an ever changing marketplace. We look forward to the challenges that lie ahead.

According to Mr Williams, the firm is 'admired' for being "client focussed and working hard at all levels of our business to provide first class service".

The Ardel group of companies currently has around 100 employees in Guernsey and has offices in the UK, Geneva and New Zealand.

Stephen  
Kavanagh,  
chief executive,  
AWD Chase de Vere



Independent financial adviser AWD Chase de Vere says that making the Top 25 Most Admired is a great achievement, as it shows how far the firm has come in two years.

"The recognition is fantastic for the firm as a whole, bearing in mind where it's come from in the past couple of years. It's another ridge on the progress that is being made within the company. We see it internally, but it's now actually being recognised externally too. It maybe means more for to us because a

### AWD Chase de Vere

couple of years ago AWD Chase de Vere would not have been in that position," said Patrick Connolly, head of communications at AWD Chase de Vere.

The company currently generates two thirds of its revenue from private wealth and plans to grow further in 2011.

"We have come from being in not a great position two years ago to making a profit in 2009, to increasing that profit by around 500 percent in 2010. We will continue to grow profits in 2011, as well as the number of advisers, and we are positioned and positioning ourselves for the RDR," added Mr Connolly.

## Baker & McKenzie

International law firm Baker & McKenzie has been on the expansion trail over the last 12 months.

The firm made several new hires and partner promotions around the world in 2010, and opened an office in Luxembourg, its 68th location and 40th country worldwide.

But what does 2011 have in store for the firm?

Ashley Crossley, partner, chair of Europe & Middle East wealth management and joint head of private client said: "We plan



Ashley Crossley,  
joint head of  
private client,  
Baker & McKenzie

to continue our growth in Russia/CIS and the Middle East and to build on the excellent reputation we have in these markets for cross-border wealth management structuring. We are also going to pursue further our Hong Kong and Singapore strategy for wealth management clients and financial institutions operating in the region."

## Bedell Trust

Independent trust company Bedell Trust is part of the Bedell Group, which also comprises law firm Bedell Cristin.

Nick Cawley, chief executive, Bedell Trust and Michael Richardson, executive chairman of Bedell Trust said that the Top 25 Most Admired accolade gives the firm "another reason to celebrate" its 40 year anniversary.

The company, one of Jersey's longest-standing players, prides itself on its independence and "strong brand".

Following the launch of Bedell Cristin (Mauritius) Partnership in November 2010,



(l) Nick Cawley,  
CEO of Bedell Trust  
and (r) Michael  
Richardson,  
executive chairman  
of Bedell Trust

the company plans to open a trust operation in Mauritius in 2011.

"We will also be installing a new administration system and a separate system dedicated to the fund administration business line. These best-of-breed IT systems will further improve our client service delivery," said Mr Cawley and Mr Richardson.

## Brooks Macdonald Financial Consulting

Independent financial advisory firm Brooks Macdonald Financial Consulting marks its 20th anniversary in 2011, and the firm said it is "delighted to be named one of the Top 25 Most Admired companies".

"We hope we are admired for many things, but most important to us and to our clients is our emphasis on putting their needs first. What we do for our clients is driven solely by the principles of an advice-driven service built on integrity. Our low client to adviser ratio facilitates a service which defines clients by name rather than number and ensures complete



Nick Lawes,  
managing director,  
Brooks Macdonald  
Financial  
Consulting

independence from product providers," said Nicholas Lawes managing director of Brooks Macdonald Financial Consulting.

Through 2011 and into 2012 the firm intends to continue attracting new clients who its independent client facing service, preparing for the arrival of RDR in January 2013 and continuing to expand its network of fellow professionals from the legal, accountancy and fund management worlds.

## Charles Russell



Robert Partridge,  
partner,  
Charles Russell

Like many private client law firms Charles Russell has a long history. It can trace its roots back to 1891.

The firm became a Limited Liability Partnership in May 2005, offers services such as tax, succession planning, wealth structuring, philanthropy and British Virgin Islands legal advice.

Robert Partridge, partner at Charles Russell, said that the firm is "thrilled" to be one of the six law firms named as a Top 25 Most Admired Companies.

"We have always been very proud of our private client team here at Charles Russell - we have one of the largest team in the UK and, we like to think, one of the very best. We are delighted to be gaining increasing recognition in the marketplace for the strength and depth of our team."

Mr Partridge said that the firm has grown "significantly" to cater for an increase in workload, and it plans to grow again in 2011.

"We are fortunate that the private wealth sector is strategically important for the whole firm, and we plan to build further on the firm's private wealth focus in 2011, so that Charles Russell is increasingly recognised as a natural choice for sophisticated UK and international clients who want to use a full service law firm that can handle all of their private wealth needs," he said.

# top 25 most admired companies

## Deloitte

Paula Higgleton,  
partner and head  
of private client  
services,  
Deloitte



Accountancy firm Deloitte LLP is the United Kingdom member firm of Deloitte Touche Tohmatsu, a Swiss Verein.

In November 2010 the firm combined its London private client and entrepreneurial business teams into one new group, with head of private client Paula Higgleton as head of the new combined team.

At the time Ms Higgleton told **privateclient** that she feels this reflects the fact that private client is seen as a “very important part of the business”.

She believes that the firm is “admired” for its team and passion in delivering “exceptional client service”.

“Our team spans right across the globe so we are able to deliver complex, joined up solutions extremely quickly and efficiently, no matter where in the world the advice is needed. We seek to work alongside our clients as their trusted adviser, ensuring that we are always taking new ideas and innovations to them. We want to ensure that all of our clients can access and benefit from everything our firm can offer in terms of advice and guidance in respect of both their own affairs and those of their businesses.”

Andrew Tailby-Faulkes,  
markets leader for  
private client  
services globally,  
Ernst & Young



Accountancy firm Ernst & Young has a multi-disciplinary team to advise on all areas of personal taxation and estate planning including trusts, inheritance tax, succession planning, capital gains tax and business structuring both in a UK and an international context.

Iain Johns,  
head of private  
client,  
Equity Trust



2011 looks to be an interesting year for Equity Trust. The company has a new investor in the form of European private equity firm Doughty Hanson, and plans are underway to merge with another business in which Doughty Hanson has a major stake – TMF Group. Subject to certain regulatory approvals, the intention is to merge, creating a household name in global complex administrative and outsourcing solutions.

“We’re delighted, and proud to take our

## Ernst & Young

It offers a wealth management service, which is designed to ensure that clients benefit from all the UK tax exemptions and reliefs available. In light of personal, family and professional circumstances and objectives the team aims to help manage clients’ investments and estate in a tax efficient manner.

It also prides itself on being able to offer “innovative solutions for entrepreneurs,” throughout their entrepreneurial life cycle.

## Equity Trust

place in a line-up that includes several of the most respected names in the business. The fact that the quality service that we provide has been recognised by independent appraisers of businesses within our industry is very valuable, and rewards a great deal of hard work during the past 12 months,” said Iain Johns, group head of private clients.

“We hope that if approved, the merger will enable the private client business line to utilise an even larger global platform in implementing a new strategy that we believe will further enhance our reputation, raise the levels of service we provide to clients and reinforce our position as leaders in our market.”

## Grant Thornton

Accountancy firm Grant Thornton is investing in its private client business. It told **eprivateclient** in December 2010 that it is looking to double the size of its private client practice in London over the next 3 to 5 years, under the leadership of new private client head in London, Craig Kemsley.

"It's a great brand, it's a great private client practice in London, and we have plans for it in terms of growing the practice," said Mr Kemsley, who joined the firm in July 2010.

The firm is actively recruiting, and Mr Kemsley said that it is looking at both



Craig Kemsley,  
partner and head  
of private client,  
London,  
Grant Thornton

junior and senior level hires.

Eric Williams, partner and national head of private client added that with the currently financial climate being like it is, private client work is a "significant operation and very stable contributor in the recession - far more resilient than cooperate work, which has become less profitable due to a smaller number of transactions."

## Investec Trust

Investec Trust is "honoured" to have been selected for the Top 25 Most Admired. "It is always gratifying to receive public recognition from our industry peers and business partners," said Paul Douglas, managing director of Investec Trust (Switzerland).

Mr Douglas added: "During 2010 we consolidated our operation and simultaneously reviewed the direction of the trust industry. With the benefit of this process, we intend to implement some exciting initiatives in 2011 to cement our



Paul Douglas,  
managing director  
of Investec Trust  
(Switzerland)

position as a leading provider in the fiduciary industry."

Based in six locations - Guernsey, Jersey, Mauritius, Johannesburg, Cape Town and Geneva - the company believes that its culture embraces entrepreneurialism, energy and enthusiasm. It will act as trustees for both usual and unusual structures, considering all types of assets.

## Kingston Smith

Chartered accountancy firm Kingston Smith LLP provides a full range of services to entrepreneurial businesses, not-for-profit organisations and individual clients. Through its many years of experience dealing with owner-managed businesses, the firm claims to understand how entrepreneurs think and the stages in which their businesses develop.

As a result, in addition to audit and



Paul Spindler,  
head of private  
client,  
Kingston Smith

accounting work, the firm has built up a wide range of specialist services from seven offices in London and the south east to support its clients. It offers additional services through its subsidiary businesses.

## KPMG



David Kilshaw,  
chair of private  
client,  
KPMG

Accountancy firm KPMG believes that serving private clients internationally is the way forward.

"I think that to have a successful private client practice in UK is getting increasingly difficult because of regulation and tax laws. Clients are getting international and I think you'd be very short sighted if you didn't realise that in the next 10 years the world is going to change, and we need to change with it," David Kilshaw, partner and chair of private client at KPMG told **eprivateclient**.

In order to serve this increasing demand and drive this international expansion, the firm has recently employed Russian and CIS tax specialist, Bob Savic to lead its operations in Russia, as that is where it feels there is wealth to be serviced.

Mr Kilshaw said that making the Top 25 Most Admired Companies is "great, as industry recognition is massively important and our private client team is very proud to rub shoulders with those on a very blue-blooded list".

He added that the firm is "very market-focused" and excited by its domestic and international plans in 2011.

"We see great opportunity in the family business space. Last year we held a hugely successful 'Next Generation' summer school and we'll be doing that again this year. As for being admired, we will work hard and listen. There's a lot of helpful guidance out there and you earn peer respect by working with other excellent people."

## Macfarlanes

Jonathan Conder,  
partner and head  
of private client,  
Macfarlanes



London-based law firm Macfarlanes has a history dating back to 1875, but became known as Macfarlanes in 1962.

Individual clients, business owners and families, as well as international clients, have always been at the heart of Macfarlanes' practice. It has no offices overseas, so services all of its clients from London.

Head of Macfarlanes' private client team, Jonathan Conder recently told **eprivateclient** that the team is experiencing an increase in business from non doms who are moving to the UK again, and the fact that it has international experience without having an international network, sometimes comes as an advantage.

For instance, the team recently picked up a large client due to separate referrals by a Swiss lawyer and a US lawyer. If the firm had been present in these markets, the lawyers may have been less eager to pass work to the team, suggested Mr Conder.

Philip Le Cornu,  
head of private  
wealth,  
Ogier



Ogier Private Wealth is the trust business of Channel Islands headquartered law firm Ogier.

Phil Le Cornu, partner and head of Private Wealth at Ogier said that "to be recognised by peers and intermediaries amongst such strong competition is a tremendous compliment to Ogier Private Wealth".

He added: "It is difficult to know with certainty what others admire about the firm, but we strive to be the leading independent provider of integrated legal and fiduciary services, and we provide those services to the major international finance centres under the laws of the

Clive Mackintosh,  
tax partner and  
head of private  
client,  
PwC



Formally known as PricewaterhouseCoopers, PwC rebranded in October 2010 and shortened its logo to its current form, in order to "strengthen and modernise" how it represents its worldwide network to clients, its people and the communities in which it operates.

The firm's private client service is dedicated to providing integrated business solutions to entrepreneurs, owner-managed and family businesses.

"We invest in private clients as they are

## Ogier Private Wealth

major offshore jurisdictions. That partner-led strategy and the people delivering the strategy is what I would like to think people have admired."

Towards the end of 2010 the firm employed Nick Wakefield to head up its new investment services offering, which will help trustees in assessing the risks when appointing investment managers.

And according to Mr Le Cornu, the company plans to do even more in 2011.

"The major initiatives will be to allow clients secure online access to agreed documentation and to bring an enhanced investment monitoring service in-house. Also, we developed a dedicated family office team in 2010 and we will be aiming to deliver a very bespoke service to a growing number of families through that team in 2011."

## PwC

an interesting and profitable client base to work with," Clive Mackintosh, head of UK private client practice at the firm told **eprivateclient**.

Mr Mackintosh believes that being part of the wider PwC group is "hugely beneficial" to private clients as the firm is able to bring a range of "different perspectives" to the client. It also enables them to access the firm's international network.

He added that PwC is able to offer international advice to ensure clients are fully compliant with all their international tax requirements, but also that they do not pay more tax than they need to.

## Rawlinson & Hunter

Accountancy firm Rawlinson & Hunter specialises in financial and taxation advice. Its network of offices stretches from the headquarters in London to New Zealand, through the Channel Islands, Switzerland, Bermuda, the Caribbean and Australia. The firm says it believes its work should maximise “the benefits that wealth can bring, by protecting it and allowing it to do what it was always supposed to do - to be



Frances Stephens,  
tax partner and  
head of trust and  
wealth services,  
Rawlinson &  
Hunter

enjoyed by the individuals who own it”. In 2010 Rawlinson & Hunter promoted Phil Collington, who is one of *Private Client Practitioner's* Top 35 Under 35 2010, and Chris Hawley to directors in the UK.

## RBC Wealth Management

RBC Wealth Management says that making the Top 25 Most Admired is a “fantastic reflection on the development of its trust business in the British Isles over the last five years”.

“The business benefits from a very strong, experienced and capable team of professionals who have successfully focused on serving our clients to help them meet their wealth planning objectives. We have also successfully completed two acquisitions since 2005 which have added to the transformation of RBC's British Isles Trust business into a leader in its field,” said Steve Romeril, head of trust, British Isles,



Steve Romeril,  
head of trust,  
British Isles,  
RBC Wealth  
Management

RBC Wealth Management.

The firm is international and also prides itself as being a bank-owned trust which behaves like an independent.

“We offer the strength and stability of Canada's leading financial institution, one of the top 20 banks in the world, whilst providing an open architecture framework to clients that enables us to work with our clients and pick the best and most appropriate solutions available in the market with them,” added Mr Romeril.

## Saffery Champness

Established in 1855, Accountancy firm Saffery Champness believes that it is admired because it doesn't try to be “all things to all people”.

James Sykes, head of the private wealth & estates group said: “We have a clear focus on private wealth and landed estates, and our expertise in these areas, amassed over our 155-year history, means that we are clear leaders in these sectors. Whilst we are a thoroughly modern, fast-paced firm, we believe in traditional values such as honesty, accuracy and integrity, and ensure that partners are genuinely hands-on



James Sykes,  
head of private  
client,  
Saffery  
Champness

throughout client engagements. We invest in our people and understand that good people attract both good work and other top-notch staff.”

The group has particular expertise in dealing with the financial and tax affairs of trusts, property owners, entrepreneurs and family-owned businesses and is a provider of offshore structures and services through its Guernsey office.

## Smith & Williamson



Joss Dalrymple,  
director and  
national head of  
private client tax  
services,  
Smith &  
Williamson

Smith & Williamson says that it can help individuals from all walks of life and those with specific sector interests with all of the tax issues they face.

In December 2010, the firm promoted head of private client tax Joss Dalrymple to national head of private client tax services (PCTS) in order to coordinate its family office offering, as private client work is “core” to Smith & Williamson, according Mr Dalrymple.

He added: “2010 has been good for us and we hope to do even better in 2011. However, we are fully aware that with ever closer scrutiny from HMRC and volatility in the economy, the road ahead may not be smooth. We will continue to focus on the core requirements of a quality service provided by a tightly integrated and client-focused team.”

The firm also works closely with other practices within Smith & Williamson group, such as its investment managers, financial planners and pensions specialists which it says “complement and enhance” the advice it can offer.

# top 25 most admired companies

## Speechly Bircham

John Ward,  
partner and head  
of private client,  
Speechly Bircham



London law firm Speechly Bircham employs 240-lawyers and advises private clients on everything from property transactions to disputes tax and trusts advice.

The firm said that it “welcomes” the Top 25 Most Admired Companies accolade as an “independent acknowledgement of its position in the marketplace”.

“Feedback from our clients and the legal directories tells us that we are known in the market for delivering cutting edge, cost-effective solutions that take our clients’ broader concerns into account, whether those concerns are around private wealth, family or business issues,” said John Ward, head of private client at Speechly Bircham.

The firm’s clients include directors of leading companies; entrepreneurs in the property, media and financial services sectors, members of the UK and foreign royal families, as well as many other individuals in The Sunday Times and Forbes Rich Lists.

In 2010 it helped supermodel Elle MacPherson win her case against the liquidated Isle of Man bank Kaupthing Singer & Friedlander (KSF).

Mark Buzzoni,  
partner and head  
of private client,  
Taylor Wessing



London law firm Taylor Wessing has already expanded its private client department with six new associate hires in 2011. The firm said that it needed to increase its staff numbers in order to service the “increasing flow of business”.

Mark Buzzoni, head of private client in the UK, said: “I think we are admired because we have a team fully able to deal with the most complex and challenging trust and tax work, but also sit within a firm which can service all of the needs of a modern wealthy family with assets and

Andrew Fisher,  
chief executive,  
Towry



Like a couple of other firms on the list, Towry also rebranded in 2010, dropping the “Law” part of its name.

The wealth adviser offers fee based, independent financial advice and independent investment management services to private individuals, with investable assets in excess of £100,000.

Towry’s vision is to become the UK’s

## Taylor Wessing

family members in different jurisdictions, and with a need for services in relation to corporate matters, reputation management, immigration, commercial and residential property, super yachts and numerous other areas which go beyond the traditional private client services.”

In 2011 Taylor Wessing wants to “continue to expand” its team whilst “continuing to drive up quality”, according to Mr Buzzoni.

“Whilst 2010 has been a period of change for us, we expect all of our recruits to be in place in 2011 and to really benefit from this enhanced offering; at the same time, we are putting still greater effort into the synergies with the wider business and our overseas offices.”

## Towry

leading provider of wealth advice, and making the Top 25 Most Admired Companies ranking “is a further endorsement that it is on its way” to achieving this, according to Andrew Fisher, chief executive of Towry.

“We are delighted to be recognised for our professional fee-based approach to providing wealth advice, coupled with our strong business disciplines and processes,” he said.

The business employs approximately 750 people in more than 20 offices across the United Kingdom.

John Riches,  
partner,  
Withers



Growing demand for global high net worth services has prompted international law firm Withers to open an office in Zurich.

The firm, which already has an office in Geneva, said that it is representing a

## Withers

growing number of individuals and organisations from Russia, Eastern European and Israel, many of whom gravitate towards Zurich as the financial centre of choice for both their corporate and individual needs.

Withers also has offices in BVI, London, Milan, New York, New Haven, Greenwich, and Hong Kong.



Mark Fairbanks Smith, partner at Sarasin & Partners



Adrian Relph, director, trust & corporate at Legis Group; Nicola Roberts, tax director at Deloitte and one of Private Client Practitioner's Top 35 Under 35 2010; and Steve Bougourd, associate director at Legis Group



Chris Wilkinson, private client partner at Cripps Harries Hall; Myles Macintosh, head of private clients at Cripps Harries Hall; and James Martingale, global head of investor services at Equity Trust

On Thursday 27 January, 2011 PAM Insight held a Louis Roederer champagne reception at Bonhams auctioneers for 140 private client practitioners, all drawn from the four separate Top 25 initiatives for Law and Accountancy firms, Trust companies and fee based IFAs. The Top 25 Most Admired Companies from the 100 were announced on [www.eprivateclient.com](http://www.eprivateclient.com) the following day and on [www.thewealthnet.com](http://www.thewealthnet.com) the following week.

# reception the night before



Eric Williams, national head of private client at Grant Thornton; Tony Risorto, Barclays Wealth Advisory; Craig Kelmsey, head of private clients in London at Grant Thornton; and Guy Quigley, head of business development at Butterfield Trust



Sam Jeffries, partner at Sarasin & Partners; and Paul Douglas, managing director at Investec Trust (Switzerland)



Wilson Cotton, director, private client tax services at Smith & Williamson; Francesca Lagerberg, head of tax at Grant Thornton; and Dani Glover, director, personal financial planning at Smith & Williamson



Tristan Blythe, group editor of PAM Insight; Len Steppings, private client consultant at Whiting & Partners; and Graham Cross, managing director of Helm Godfrey



Charles-Henry Courtois, head of international trust and wealth structuring at Merrill Lynch; and Urooj Alam, vice president of trust and wealth structuring at Merrill Lynch

Fran Snoding, trust director at Intertrust; Helen Jones, tax partner at BDO; and Alan Binnington, trust director at RBC Wealth Management



Tom Hewitt, private client partner at Burges Salmon; and Robert Partridge, head of private client at Charles Russell



Claire Archer, private client partner at Penningtons; and Peter Greswold, partner at Wrigleys



Ceris Gardner, partner at Maurice Turnor Gardner; James Anderson, founder and editor-in-chief, PAM Insight International; and Joss Dalrymple, director and national head of private client tax services, Smith & Williamson.



# reception the night before



Polina Khoroshilova, reporter at thewealthnet;  
and Iain Johns, managing director at Equity Trust



Alison Meek, partner at Marcus Sinclair; and  
Nicholas Lawes, director at Brooks Macdonald  
Financial Consulting



Rhoddy Voremberg, partner at Farrer & Co; and  
Michael Stanford-Tuck, local group head of  
private client and trusts at Appleby



Richard Bertin, managing partner of Asquith  
Partners; and Lee Robertson, chief executive of  
Investment Quorum



Caroline Jarvis and Lisa Cornwell, executives at  
Kleinwort Benson Trust



Ed Hicks, managing director of PAM Insight

*a wealth of knowledge – a knowledge of wealth*



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