

The Redstone Private Banking Update



Welcome to the Redstone Private Banking Update 2019: Q1

As we close out Q1 2019 Redstone has tracked some interesting changes across EMEA, APAC and the Americas. Whilst many institutions have remained active there is a noticeable drop in overall volume based on the previous quarter. There are a number of contributing factors to this including continued Brexit uncertainty, fiscal year end and less obviously – a lot of teams are looking to consolidate on headcount gained in the flurry of activity witnessed in the latter half of 2018. One trend spotted was the percentage of senior hires moving to institutions such as BOS London, HSBC Germany and DBS Singapore. Once these seniors are settled and start to implement their mandates we expect to see a rise in hiring appetite through quarters two and three.

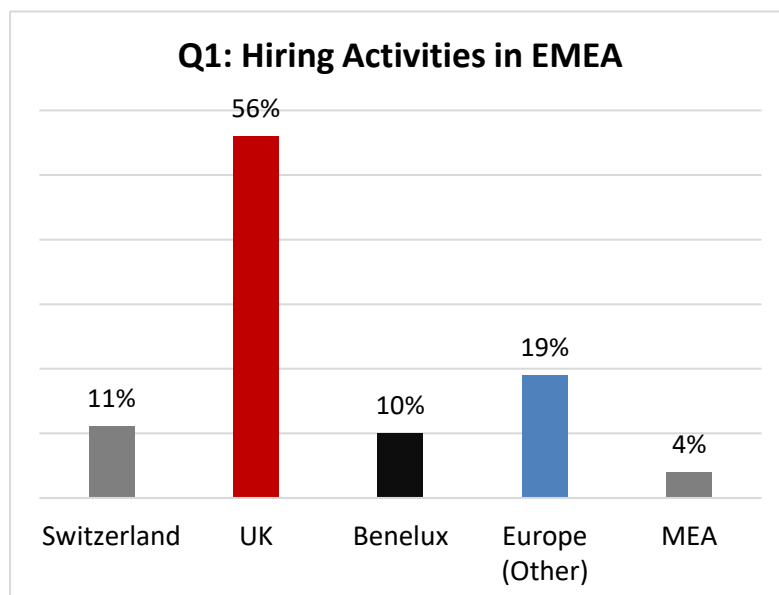
Noteworthy Talent Moves in EMEA

As is the norm in the day to day recruitment of talent, institutions throughout EMEA are aiming to on board bankers with strong established books showing good ROA. The UK domestic market remains active with Julius Baer adding several senior bankers to the team. On the continent, banks in Germany, Spain and Italy have expanded both their front line representatives and support teams. We have also noticed firms within the Swiss market such as Edmond De Rothschild go through substantial re-structuring and reorganisation which continues the narrative of consolidation we are witnessing here. This leads from a continuing trend spotted in the latter half of 2018 where net new money levels were stalling and cost reduction measures were announced. Europe was the standout region this quarter showing the most hiring activity with the UK leading the way – this seemingly in spite of Brexit which is interesting as many firms are still pointing to Brexit as a lead reason for reduction in hiring appetite.

It is reported that **Barbara Rupf Bee** – Head of German Onshore Wealth Management with UBS Europe – is leaving the firm mid-May to assume the new role of Head of Europe, Middle East and Africa with Allianz Global Investors. Rupf Bee will report to Tobias Pross, who had remained in that position ad interim while also acting as global head of distribution after his appointment in April 2018. Standard Chartered Bank has appointed **Eleftherios Sachanidis** – most recently Director – Team Head Saudi/Levant with Coutts – to the role of Executive Director MENA in London. Sachanidis – a former Vice President Private Banker with Barclays Wealth Management – joined Coutts Q3 2011 as Director, Relationship Manager International. He spent ten years with Barclays. **Omar Omari** – Wealth Manager Middle East Private Banking with Coutts & Co – has been appointed to a senior ME private banking role with Standard Chartered Private Bank in London. Omari first joined Coutts & Co Q3 2012 from Credit Suisse where he held an advisory role. Prior to this he spent one-and-three-quarter years in a similar role with RBC Wealth Management.

It is reported that Julius Baer has hired three Relationship Managers as it continues an aggressive regional expansion plan – the hires include **Colin Aitken** – most recently with UBS Wealth Management – who will be based in the firm's Edinburgh office. Aitken co-founded and headed UBS's Scottish office for nine years. Secondly **Mark Dooner** is understood to be joining the firm's Manchester office from Tilney, where he held the role of Advisor, Investment Manager. **Laurence Patmore** – Director & Senior Private Banker with Barclays – also joins as Managing Director & Senior Advisor in London, tasked with growing Julius Baer's network across the region and support clients in the Cambridge area. Patmore first joined Barclays 1998. **John Lochrie** – Executive Director with First Abu Dhabi Bank [FAB] – has been appointed as Managing Director with Auris Wealth Management SA in

Geneva. Lochrie joined FAB at the start of 2016 from Credit Suisse where he held the role of Director Middle East – covering UHNW GCC client coverage, private investment banking with the firm. It is reported that Deutsche Bank Wealth Management has made two key appointments, hiring **Marco Pagliara** of Goldman Sachs and **Alessandro Caironi** of Credit Suisse as part of a major restructure of the business. Pagliara has been appointed Head of Northern & Eastern Europe, which includes the UK and the Nordic regions – he will join in June from Goldman Sachs where he headed the firm's Swiss and Continental European business. Caironi joins as Head Investment Manager & Sales Management Europe and UHNW Coordinator.



Joseph Jawad – most recently Senior Private Banker with Arbuthnot Latham & Co., Ltd – has been appointed as Client Relationship Director with independent investment office Sandaire in London. Jawad first joined Arbuthnot Latham & Co. at the close of 2013 in London, subsequently relocating to Dubai with the firm one year later – progressing to the role of Director International Private Banking at the beginning of 2016. Prior to this he formerly spent three years with Standard Bank Group. It is reported that Independent Wealth Management Specialist **Alain Gallati** has left UBS after a quarter of a century to join Pictet in Zurich. It is understood upon joining in June he

will take charge of the private custody business in Zurich within Pictet's asset services. At UBS Gallati held the role of Market Head Financial Intermediaries for the German-speaking part of Switzerland, a role within the wealth management division of the Swiss bank. **Schuster Alexander** – most recently Senior Client Relationship Manager with Berenberg – has been appointed as Director Private Banking, Head of Branch with HSBC Private Banking in Stuttgart, Germany. Alexander spent seven-and-three-quarter years with Berenberg – joining the firm Q2 2011 from Commerzbank where he spent seventeen-and-a-half years, holding the role of Deputy Head of Wealth Management, Department Director prior to his departure.

It is reported that Spanish Banca March has continued the expansion of its private banking unit with the appointment of **Ana Pascual** as Private Banker. Pascual joins the firm from Abante Asesores, where she held the role of Financial Advisor for five years. Prior to this, she held various analysis/consultancy positions within multiple institutions including BDO, Natixis. It is reported that **Annabelle Bryde** – presently Chief of Staff Global UHNW with UBS – is to join the Vontobel Wealth Management leadership team on July 1st, 2019, assuming market responsibility for the Anglo-Saxon region incl. Scandinavia. In this new position Bryde will also become a member of the executive board of Vontobel Wealth Management under the leadership of Georg Schubiger. From 2006 - 2008, Bryde held the role of Head of UBS Wealth Management International USA in New York. She subsequently held leading positions with UBS in Switzerland in the business with international wealth management clients. **Shahzad Ali** has been appointed as Head of Private Banking with First Abu Dhabi Bank [FAB]. Ali held the role of Head of Investment Advisory, Private Banking with ADIB – Abu Dhabi Islamic Bank from Q1 2012 – Q2 2016 after nine-and-one-quarter years as Managing Director with HSBC Private Bank in Geneva. It is reported that Perella Weinberg Partners LP has hired **Clinton Ray** and **Guy Morgan** from Goldman Sachs Group Inc. to expand its European restructuring business. It is understood they will start at Perella Weinberg in London this June with Ray - who led Goldman's restructuring business in EMEA - joining as Partner. Morgan - who will hold the role of MD with Perella Weinberg - has headed Goldman's liability management group in EMEA since 2011.

Robert Rausch – most recently Chief Financial Officer & Chief Investment Officer with Fondazione Enasarco – has been appointed as Location Head & Regional Head of Private Banking with EFG Bank in Ticino. Rausch formerly spent seventeen-and-one-quarter years with UBS, holding the role of Head UHNWI Wealth Solutions from Q2 2008 – Q1 2010. He then spent close to six years as MD, Head Investment Solutions and CEO Asset Management with Banca Esperia and Duemme International in Milan. Degroof Petercam has hired Senior Private Banker **Patrick Leysen** in Antwerp, Belgium. Leysen joins from BNP Paribas Fortis where he spent thirteen-and-three-quarter years – holding the role of Private Banker from Q3 2014 with the bank. Banque Transatlantique has

appointed **Charles Falck** – most recently Associate Director Wealth Management with Julius Baer – as Senior Private Banker in London. Falck joined Julius Baer mid-2013 from Merrill Lynch where he held the role of Associate – Global Wealth/Investment Management from Q1 2008. It is reported that Alternative investment syndicator Connection Capital has hired former Invesco Private Bank Sales Manager **Lorna Robertson** as Head of Funds. Robertson joined Invesco in 2015 – she formerly spent four years as Head of Credit Sales with Raiffeisen Bank in London. **Edward Walecki** has been appointed as Senior Private Banker with Lombard Odier Group in Brussels, Belgium. Walecki formerly held the role of Family Officer & Wealth Manager with Blue Bridge Wealth Management Inc. from mid-2017.

Placido Albanese – former Head of Portfolio Management with Valartis Bank AG – has been appointed as Head Advisory with Falcon Private Bank in Zurich. He most recently held the role of Chief Investment Officer with Banque Cramer from Q3 2014. Albanese spent one-and-one-quarter years with Valartis Bank, joining mid-2013 after four-and-a-half years as Chief Investment Officer with Liechtensteinische Landesbank [Switzerland] Ltd. It is reported that Geneva-based Wealth Manager Pictet has appointed Julius Baer Banker **Marc Braendlin** to take over the firm's Latin America desk in Zurich from October – reportedly joining with a team of colleagues from Julius Baer alongside some figures joining from Brazil's Itaú Private Bank. The Latin America hires will be based in Geneva, Nassau, and Zurich. Braendlin is presently Deputy Head of Julius Baer's wealth arm in Latin America. **Liz Bottomley** – Managing Director Private Banking with Arbuthnot Latham – has been appointed as Managing Director with Bank of Singapore, charged with building and managing the private bank's presence in London. Bottomley first joined Arbuthnot Latham Q3 2012 after seven-and-a-half years as Client Partner International Private Banking with Coutts. Independent FinTech outfit Mybanker has appointed **Marlene Nørgaard Carolus** as Group CEO in Copenhagen. Carolus formerly held the role of Executive Vice President, Global Head of Private Banking/Wealth Management with Danske Bank from Q4 2011 – Q3 2018. Prior to this she spent three-and-a-half years as Private Banking Strategist & Chief Acquisition Manager with Nordea. Wealth/Asset management advisory services outfit DAVY has appointed **Conor McCann** – Senior Private Banking Manager with Danske Bank – as Head of Business Development. McCann first joined Danske Bank mid-2008 from Northern Bank. Barclays Wealth Management has appointed **Anisha Randhawa** – most recently with Tilney Group – as Private Banker in London. Randhawa spent four-and-a-half years with Tilney Group – joining the firm Q3 2014 from Standard Life Investments, holding the role of Senior Associate, Investment Advisor from Q1 2018. Barclays Wealth Management has also hired **James Hamilton** – former Head of FX/TF Sales Desk with financial services firm Ebury – as Private Banker in London. Hamilton spent close to three years with Ebury, subsequently joining Killik & Co as Investment Manager toward the end of 2016.

Wealth/Investment management firm Brown Shipley has appointed Private Banker **Lee Ramsden** – Vice President with Barclays Private Bank – as Director. Ramsden joined Barclays Q2 2012 from wealth advisory firm Towry. BENDURA Bank AG has appointed **Anatolijs Natorcha** as Director, Head of Institutional Clients Eastern Europe Desk in Lichtenstein. He joined earlier this year from BlueOrange Bank where he spent over a decade. **Julian Melling** has been appointed as Global Wealth Solutions Specialist – UHNW with Utmost Wealth Solutions in the Isle of Man. Melling is a former Head of UK with Swiss Life Global Solutions, holding this role from Q3 2014 – Q1 2019. KBC Bank has appointed **Jeroen Vandenbroucke** of Société Générale Private Banking – to the role of Private Banker in Ghent. Vandenbroucke spent an original stint as Client/Investment Advisor with KBC from Q4 2012, subsequently joining Société Générale Q3 2017. Ahli United Bank has appointed **Ali Chami** – Senior Manager Private Banking with Europe Arab Bank – to a similar role in London. Chami joined Europe Arab Bank Q3 2017 after holding Private Banking Manager roles with Al Rayan Bank/National Bank of Kuwait across eight years. BNP Paribas has appointed **Olivier Verhavert** as Private Banker Business Developer in Flanders, Belgium. Verhavert most recently held the role of Senior Account Manager with Dekerf & Partners. ARCHITAS has appointed **Tim Roubben** as Private Banker in Limburg, Belgium. A former Private Banker with BNP Paribas Fortis from Q4 2013 – Q1 2017, Roubben joins from Delen Private Bank. Coutts has hired Private Banker **Dipesh Rai** of NatWest Private for a senior role in London, responsible for managing up to 250 HNW sports/entertainment connections for the firm. Rai first joined NatWest Private Q4 2011 from SAGA Plc.

Kate Boswell – Client Director & Head of Private Office North with Handelsbanken Wealth Management – has been appointed as Director with Stonehage Fleming in London, advising HNW/UHNW clients. Prior to joining Stonehage Fleming, Boswell headed up the Private Office team in the North for Handelsbanken WM, providing integrated investment, financial and tax services to the firm's clients. Investec has appointed **Chris Duck** – most recently Senior Private Client Manager with Allied Irish Bank – to the role of Private Banker in London. Duck spent close to three years with Allied Irish Bank, joining Q2 2016 after four-and-one-quarter years as Relationship Manager Private Banking with Clydesdale Bank. Investec has also appointed **David Akers** – most recently Private Banker with Coutts from Q3 2016 - & **Jon Wagstaffe** – former Private Banker with Credit Suisse - Relationship

Manager with Barclays Wealth and Investment Management – as Private Banker[s]. Akers first joined Coutts at the start of 2015 from Barclays whilst Wagstaffe joined Barclays in the Isle of Man Q2 2009. Lastly Investec has appointed **Amanda Hallam** – most recently Partner, Wealth Advisor with St. James's Place Wealth Management – to a private banking business development role in London alongside **Elena Kleanthous** – appointed as Private Banking Business Development Manager in London. Hallam spent two years with St. James's Place Wealth Management – joining the firm Q4 2016 from Bank of America Merrill Lynch. Kleanthous joins Investec from a similar role with RCB Bank Ltd. **Jarrod Naidu** – Private Banker with Investec in Johannesburg, South Africa – has been appointed to the role of Private Banker with FNB Private Wealth. Naidu first joined Investec mid-2012. **Nada Sawadi** has been appointed as Private Banker with National Bank of Kuwait in London. Sawadi joins from Europe Arab Bank, first joining the firm at the end of 2016.

HSBC has promoted **Emma Gange** to the role of Head of HR Global Private Banking in London. Gange has spent close to ten-and-three-quarter years with HSBC, first joining Q3 2008 after three-and-three-quarter years as Director HR with Brunswick Group. **Marc Eeckhout** has been appointed as Senior Strategist with Puilaetco Dewaay Private Bankers in Brussels. Eeckhout joins from BNP Paribas Fortis where he held the role of Strategist/B-REITs Analyst from Q2 2012. Mercier Vanderlinden Asset Management has appointed **Inge De Greve** – most recently with Degroof Petercam – as Private Banking Officer in Bussels. De Greve spent nine years with Degroof Petercam. **Christina Lonergan** – Head of UK & Offshore FX Execution with Barclays Wealth Management – has been appointed as Director, Head of Banking & Credit Barclays Private Bank Ireland in Dublin. Lonergan first joined Barclays Q3 2007 in an FX sales role. Bank of Ireland has appointed **Jonathan Crabb** – most recently Private Banker with Coutts – as Business Development Manager in London. Crabb formerly spent six-and-one-quarter years with Royal Bank of Scotland from mid-2012, holding the role of Private Mortgage Advisor from the close of 2016.

Noteworthy Talent Moves in Asia

APAC has not had the busiest quarter in relation to the total volume of moves however the seniority levels make for very interesting reading as it seems many of the larger institutions and smaller family offices prioritise strategic hires over the hunter private banker / wealth management candidates. A trend that tends to indicate underlying uncertainty or weakness in the market – as explored above, this trend is usually the precursor to enhanced hiring of front line staff in the following quarters. The Bank of Singapore is looking to expand its reach and they have launched a new wealth management subsidiary in Europe aimed at targeting the largest populace of UHNW individuals globally. This is a move designed to hedge the risk of stagnating business in Asia and provides the Bank of Singapore with a stronger global footprint.

ANZ has appointed **James Hands** – most recently Head of Business Development - Financial Markets Sales VIC/TAS/SA with HSBC – as Senior Private Banker in Melbourne, Australia. Hands spent three years with HSBC – joining Q4 2015 after nine-and-one-quarter years with National Australia Bank [NAB] – serving as Associate Director – Foreign Exchange/Commodities with the firm from Q1 2014. It is reported that HSBC Private Bank has made two appointments with view to renewing its focus on serving the UHNW segment in Asia. **Gabriel Tam** has been appointed Regional Head of UHNW Solutions, Asia, with responsibility for connecting sophisticated clients with product capabilities from both HSBC's Private Banking and Global Banking and Markets product teams. **Erik Bergqvist** has been appointed Head of UHNW Segment Management, to develop and deliver HSBC Private Banking's UHNW proposition and client experience. Tam has more than seventeen years of financial markets experience. He most recently held the role of Asia Pacific Head of Equity Derivatives Distribution with Bank of America Merrill Lynch in Hong Kong, responsible for sales of flow and structured Asian equity derivatives to institutional clients globally. Prior to that, Tam was Asia Pacific Head of Convertible Bonds Distribution at BAML. Bergqvist – along with a new UHNW servicing team – will provide a dedicated centre to support UHNW clients across the Asia Pacific. Formerly of Julius Baer and UBS, he has more than seventeen years of financial services/wealth management experience. Lastly HSBC Private Bank has appointed **Cynthia Lee** – most recently Managing Director with JP Morgan Chase & Co. – to the role of Head of Private Wealth Solutions North Asia in Hong Kong. Lee spent thirteen years with JP Morgan Chase & Co.

It is reported that BANK of Singapore [BOS] has hired veteran banker **Richard Hu** as Market Head for the Greater China region in Hong Kong. Hu has more than twenty years of experience in the region - he will lead a team of Relationship Managers in developing and strengthening client relationships, as well as growing new capabilities, reporting directly to Derrick Tan, Chief Executive of BOS's Hong Kong branch, & Global Market Head for Greater China and North Asia. Deutsche Bank has appointed **Jonathan Poh** – most recently Executive Director with UBS – as Senior Private Banker in Singapore. Poh spent eleven years with UBS – formerly holding the role of Director/Private Banker with American Express from mid-2003 until the start of 2008. Prior to this he held the role of Client Relationship Manager/Team Leader with Citi for four-and-a-half years. UBS has appointed **Jed Wei Lii Khoo** as Executive Director UHNW APAC Business Risk Partner with the firm in Singapore - he most recently held the role of Director RISK ORC, Wealth Management APAC with BNP Paribas. A former Head of Business Development with PricewaterhouseCoopers from Q3 2008, Lii Khoo first joined BNP Paribas Q1 2014 as Regional Head of Operational Risk Governance. It is reported that DBS has hired **Lee Woon Shiu** to be the firm's new Regional Head of Wealth Planning, Family Office & Insurance Solutions for its private bank, taking responsibility for driving the expansion of the bank's wealth planning, family office and insurance offerings, and advising HNW families. Lee takes over from Rob Ioannou, who remains at DBS Private Bank – he joins from Bank of Singapore where he most recently headed its wealth planning, trust and insurance business.



Jasjeet Singh – most recently Vice President with IIFL Wealth Management – has been appointed to the role of Vice President – Senior Private Banker – Global Private Clients with HDFC Bank Ltd. in New Delhi, India. Singh spent three-and-three-quarter years with IIFL – first joining the firm mid-2015 from Kotak Mahindra Bank. Bank of Singapore has appointed **Naoya Ohara** – most recently Director, Portfolio Manager with Theoria Capital Management Pte. Ltd. – as Director, Investment Counsellor. Ohara spent eight-and-one-quarter years

with Theoria Capital Management – joining the firm toward the end of 2010 after two-and-a-half years as VP Portfolio Manager with Asuka Asset Management Ltd. in Tokyo. HSBC Private Banking has made several recent APAC-focus senior appointments, hiring **Maarten van Hellemond** – most recently Senior Relationship Manager International Private Clients with Standard Chartered Bank – as Director. Van Hellemond spent two years with Standard Chartered Bank, joining Q1 2017 from Meyado Private Wealth Management. Prior to this he spent two years as Executive Director/Senior Private Banker with Union Bancaire Privée Private Banking in Zurich. HSBC Private Banking has also appointed **Rowan Tan** – most recently Director with Deutsche Bank – as Head Global Solutions Group SEA in Singapore. Tan spent eight years with Deutsche Bank, joining the firm at the beginning of 2011, covering investment banking coverage and origination of corporate finance mandates from wealth management clients. Prior to Deutsche Tan spent three years with BNP Paribas as Vice President Corporate Finance South East Asia.

Lastly **Clifton Ng** – Asia Corporate Coverage Specialist with National Australia Bank – has been appointed as Director with HSBC Private Banking in Hong Kong. Ng first joined National Australia Bank Q4 2016 after a former six-year stint with HSBC – holding the role of Senior Vice President Asia Corporate from Q2 2015 – Q3 2016. **Jane Moore** – most recently Senior Private Client Manager with National Australia Bank – has been appointed to the role of Private Banker with Commonwealth Bank in Melbourne, Australia. Moore spent four years with National Australia Bank, joining the firm at the start of 2015 after eight-and-one-quarter years as Senior Private Wealth Manager with ANZ. **Roger White** – most recently Senior Private Banker with ANZ – has been appointed as Investment Advisor with Hobson Wealth Partners in Tauranga, New Zealand. White spent seven years with ANZ. Credit Suisse has appointed **Eric Kang** – Managing Director with UBS – as MD & Vice Chairman Private Banking

South East Asia in Singapore. In this new role Kang will drive business momentum by growing and strengthening the bank's relationship with key clients and stakeholders in Southeast Asia, reporting to Benjamin Cavalli, Head of Private Banking South Asia and CEO Singapore. Kang joined UBS mid-2014.

Noteworthy Talent Moves in the Americas

Unlike the patterns witnessed in the APAC region the Americas has provided an interesting range of moves from the expected private banker / wealth management hunters to the senior director / c-suite level hires. Again this is representative of the differing range of investment options open to clientele in the region. There is an increasing appetite among family office setups to focus on the emerging markets in the LatAm region – often based out of the USA but with several firms now looking to expand activities on the ground in Uruguay and Argentina. Due to political uncertainty, hyperinflation and financial struggles in Venezuela, private banking and wealth management activities at all levels have ground to a halt – which goes a small way towards explaining the hiring patterns we have seen in LatAm this quarter. The obvious trend we noticed this quarter was the sheer volume of hires in N. America versus the rest of the continent.

CIBC Private Wealth Management US has appointed **Jennifer Normile** – most recently Private Banker with BNY Mellon Wealth Management – as MD, Market Manager Private Banking with the firm in Dallas, TX. Normile spent four-and-a-half years with BNY Mellon – first joining the firm mid-2014 from Comerica Bank. Atlas Bank [Panama] SA has appointed **Oliver Hohermuth** to the role of Vice President/Head of Private Banking. Hohermuth – a former Director with Vontobel from 2013 onward – holds the role of Principal/Chief Investment Officer with Rising Star Financial LLC. JP Morgan Private Bank has appointed **Michael Schodrof** – most recently Managing Director with Guggenheim Partners – to the role of Private Banker in Chicago, IL. Schodrof spent three-and-three-quarter years with Guggenheim Partners, joining mid-2015 to open the firm's Midwest sales office after close to five years as Director with Barclays Capital. Prior to this he spent four years as Director with Deutsche Bank. **Marc Weintraub** – most recently Vice President & Private Banker with Popular Bank – has been appointed as Senior Private Banker, FVP with Israel Discount Bank in New York. Weintraub joined Popular Bank Q3 2017 after two years as Relationship Manager with Citi. **Genevieve Cloutier** – Manager Financing Solutions with National Bank Private Banking – has been appointed to the role of Senior Private Banker, Team Lead Scotia Wealth Management with Scotiabank in Montreal. Cloutier first joined National Bank Private Banking Q2 2018 from RBC Bank where she held the role of Director of Underwriting with the firm from mid-2015.

Frost Bank has appointed **Michael Walsh** – most recently with SunTrust – as Vice President, Private Banker in Atlanta, GA. Walsh spent close to four years with SunTrust – joining the firm mid-2015 from First Citizens Bank and Trust Company, Inc. UMB Bank has appointed **David Crittendon** – most recently Senior Vice President Private Banking, Managing Director Private Wealth Management with US Bank – as Regional Manager Private Wealth Management. Crittendon joined US Bank at the end of 2013 after twelve years with Wells Fargo - holding the role of SVP, Central California Regional Private Banking Manager from Q1 2011. US Trust has appointed **Stephanie Clay** – Vice President, Senior Private Banker with Wells Fargo – to the role of Vice President Private Wealth in Houston, TX. Clay first joined Wells Fargo Q2 2016 from Comerica Bank where she held the role of VP, Relationship Manager from the close of 2013. City National Bank has appointed **Nick Zappia** – most recently Regional Director Private Banking with BNY Mellon Wealth Management – as Private Banking Region Manager in Los Angeles. Zappia first joined BNY at the beginning of 2016 after five-and-a-half years as MD Commercial Banking with Banc of California. City National Bank has also appointed **Haroon Sattari** – most recently Vice President Private Banking with Citi – to the role of Vice President, Client Manager in San Francisco. Sattari spent five-and-a-half years with Citi, joining the firm Q3 2013 from Abbot Downing.

Nora Shamasha – most recently Vice President, Private Banker with Union Bank – has been appointed as Vice President, Client Manager – Private Banking with City National Bank in San Diego, CA. Shamasha spent two-and-a-half years with Union Bank, joining the firm mid-2016 after six-and-a-half years with Wells Fargo – holding the role of Private Banker/Brokerage Associate with the firm from Q4 2013. JP Morgan Chase & Co. has appointed **Philipp Biechteler** as Vice President Private Banking in Atlanta, GA. Biechteler formerly held the role of Private Banker & Wealth Advisor Associate with GenSpring Suntrust Private Wealth from Q3 2014 until the end of 2017. Santander Private Banking International has appointed **José María Gaité-Pérez** – most recently with Credit Suisse – to the role of Vice President Senior Banker Private Banking, Mexican desk in Miami, FL. Gaité-Pérez joined

Credit Suisse 2016 as VP Private Banking RM Iberia from Altair Management Consultants where he held the role of Manager of the firm's private banking division for two years. First International Bank & Trust has appointed **Charles Cooper** – most recently Senior Private Banker with Wells Fargo – to the role of Regional Private Banking Manager in DK. Cooper spent sixteen years with Wells Fargo.

Jeremy Nicholas – most recently Senior Vice President, Senior Private Banker with CoBiz Private Bank – has been appointed as Senior Vice President, Senior Commercial Loan Officer with Western States Bank in Denver, CO. Nicholas joined CoBiz Private Bank at the end of 2017 after nine years with First Western Trust Bank, holding the role of President from the start of 2016. **Patrick Butler** has been appointed as Vice President, Portfolio Manager Private Banking with Wilmington Trust in Washington, DC. Butler most recently held the role of Asst Vice President with M&T Bank. Citi has appointed Senior Private Banker **Kevin Petrosyan** – most recently with Wells Fargo Private Bank – as Senior VP in San Francisco. Petrosyan first joined Wells Fargo mid-2006.



Tim Houska – most recently Vice President Wealth Management with Great Western Bank – has been appointed as Private Banker with Security Savings Bank in South Dakota. Houska joined Great Western Bank Q2 2016 after fifteen-and-one-quarter years with HOME Federal Bank. **Bryan Hayes** – most recently Private Banker with JP Morgan – has returned to Hancock Whitney in a senior private banking role in New Orleans, LA. Hayes originally spent five-and-a-half years with Hancock Whitney in a commercial banking role from Q2 2009 before joining JP Morgan at the close of 2014. Brookline Bank has appointed **Mark Miller** – most recently Senior Vice President –


Team Leader with Boston Private Bank – to a similar role with the firm in Waltham, MA. Miller spent ten years with Boston Private Bank, joining 2008 after four years with Middlesex Savings Bank where he held the role of VP from 2004. **Andrew Ivens** has been appointed as Private Banker with boutique start up Private Bank Admirals Bank in Boston. Ivens joins from Citizens Bank where he most recently held the role of Premier Advisor from Q4 2015. BMO Private Banking has appointed **Arthur Tu** – most recently with TD Private Wealth Management – as Senior Private Banker in Toronto, Canada. Tu spent four years with TD Private Wealth Management, joining the firm Q2 2015 from CIBC. BANC Of California has appointed **Aaron Houpis** – Vice President Business Banking with Comerica Bank – as Senior Director Private Banking in Los Angeles. Houpis first joined Comerica Bank at the close of 2008 from Wells Fargo.

Michael Wang has been appointed Director Team Lead Private Banking with Scotiabank in Toronto, Ontario. Wang joins from RBS where he held the role of Director for the firm's private banking/wealth management operations from mid-2017. Prior to this Wang held the role of MD with China Construction Bank from Q3 2016. **Angie Ackerman** – most recently Private Wealth Advisor with BMO Private Banking – has been appointed as Vice President Private Banking Relationship Management with Commerce Bank in St Louis, MO. Ackerman held the most recent role of Advisor with BMO from Q2 2014. **Grace Branco** has been appointed as Private Banker with MANULIFE Private Wealth in Toronto, Ontario. Branco joins from TD where she held the role of Senior Private Banker from Q3 2018. Fifth Third Private Bank has hired **Richard Crumpler** – most recently Premier Banker with Wells Fargo – as Private Banker in Greenville, South Carolina. Crumpler spent nine years with Wells Fargo, first joining Q1 2010. Cambridge Trust Company has appointed **Lubov Levin** – Premier Officer with HarborOne Bank – as Private Banker in Boston. Levin joined HarborOne Q2 2018 from Rockland Trust. Fifth Third Private Bank has appointed **James Jones** as Wealth Management Advisor in Greenville, South Carolina. Jones joins from Wells Fargo where he held the role of Wealth Advisor/Senior Vice President from Q4 2013.

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