

A portrait of a man with a beard and a black turban, wearing a pinstriped suit jacket, a striped shirt, and a dark tie. He is smiling slightly. The background is a blurred office setting.

 citywealth

**2017**  
future   
leaders **100**

Cover image: Majid Hussain, BDO

# 2017

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## future leaders 100

Welcome to the third edition of the Future Leaders Top 100 list, our annual feature of rising stars under 40 in the private wealth industry.

Listed alphabetically by specialism and surname, the list has been compiled from a number of sources. Part of the research was generated from our annual Citywealth Leaders List and the results of our 2016 Citywealth Future Leaders Awards. This was combined with recommendations from leading figures in the financial services industry, UHNW clients, and charities. All these recommendations recognise the years of study and hard work that have enabled them to reach their current professional status.

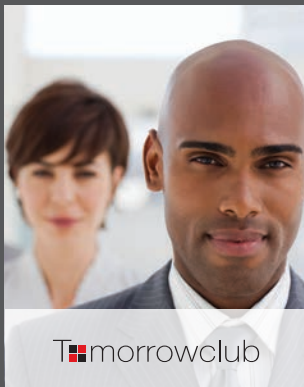
We would like to offer our congratulations to those who have made our Top 100 Future Leaders list 2017.



Karen Jones  
Editor  
Citywealth



Marcela Kunova  
Assistant Editor  
Citywealth



# Join one of Citywealth's private wealth management networking clubs

Citywealth networking groups meet in London four times a year in the early evening. Each group has members from leading firms in London, the Channel Islands and Switzerland, including Barclays, Bircham Dyson Bell, Butterfield Group, Cazenove Capital, Capital Generation Partners, Charles Russell Speechlys, Farrer & Co, First Names Group, Hawksford, Gowling WLG, Macfarlanes, Mills & Reeve, Penningtons Manches, Rothschild, Smith & Williamson, Stanhope Capital, Stewarts Law, Summit Trust International and UBS.

**WP Club** – To help relationship managers and intermediaries gain mandates and new UHNW client instructions.

**Powerwomen Club** – To support gender and diversity in the City.

**Tomorrow Club** – To help mentor those in their first or second job and help them build their lifelong connections.

To find out more about our networking clubs  
contact **Calin Lapuste**  
[clapuste@citywealthmag.com](mailto:clapuste@citywealthmag.com)



**Andrew Dixon** | partner  
Moore Stephens  
Isle of Man

*"As a partner, Andrew continued to work incredibly hard over the year maintained a policy of pushing boundaries, finding and exploiting new business lines and ensuring that Moore Stephens not only performs financially but is a credit to its people and brand."*

**Tell us about your greatest achievement in 2016/2017.**

Winning 'Accountant of the Year' in Citywealth's 2016 Future Leaders Awards. I was honoured to have received an award based on merit and also grateful to our team who made it happen. Winning through a public vote and a shortlist committee was a proud moment.

**What CSR projects are you involved in?**

We are heavily involved with local Manx charities: Wish upon a Dream, who give terminally ill children a chance to realise a special wish; the Manx Wildlife Trust which conserves local wildlife and the annual Isle of Man Art Society Easter Exhibition which I will speak at this year.

**Tell us about any promotion or qualification you achieved last year.**

I was recently licensed to carry out ATOL (Air Travel Organiser's Licence) reporting work, which is a great addition to the services that Moore Stephens already offer. In November I played a part in ensuring that the firm retained its ISO 9001:2008 accreditation.



**Ammar Hamza** | financial adviser  
PwC  
England

*"Ammar immediately offered clear, insightful analysis of my financial circumstances and objectives. He made me feel confident of the proposed solution to my pension investments. We made progress within a matter of days."*

**Tell us about your greatest achievement in 2016/2017.**

Helping a particular client who had become sceptical of financial advisers after having recently finished a lock-in period with an expensive adviser which resulted in a bad experience. Their portfolio had high fees and was in a high-risk investment strategy not aligned to the client's objective. I recommended a different solution which the client has accepted.

**What specific CSR activities or projects are you involved in and why?**

Last year, I participated in PwC's Triathlon to raise money for the PwC Foundation which supports a number of charities including, the Alzheimer's Society, Beyond Food Foundation, Wellbeing of Women, Groundwork and National Literacy Trust.

**Tell us about any promotion or qualification you achieved last year.**

I've completed my qualification with the CII and I am now a Chartered Financial Planner. This is in addition to being a Chartered Account (ICAEW). Internally at PwC, I was promoted to financial adviser.



## EXPERTISE CONNECTED

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# Accountants

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**Jo Hurley** | tax associate director  
Deloitte  
England



**Majid Hussain** | tax director  
BDO  
England

*"Majid has been our 'go to adviser' for many years now, he clearly possesses technical flair and has a strong commercial outlook. His ability to digest complex issues and advise in plain non-technical jargon has resulted in a deeply trusted relationship for many years now."*

**Tell us about your greatest achievement in 2016/2017.**

I support voluntary community groups that help the vulnerable in our local communities. I do a lot of work with the disenfranchised including workshops at prisons, which was recognised by a number of institutions, including a global charity and the London Metropolitan police. I was asked to deliver a series of lectures which were arranged by the charity, and I was asked to give the opening speech to the London Metropolitan Police (AMP) Annual General Meeting.

**What specific Corporate Social Responsibility activities or projects are you involved in and why?**

I am the co-founder and trustee of a London-based charity which mentors inner city children and young adults around the London area. My key driver in mentoring these young adults is to impart some of the great opportunities that the City of London has given me. They can hear first-hand of the vibrancy and diversity that I have experienced in the City and that they too have every opportunity to make a success in whatever they inspire to do regardless of their background, gender or race.



**Richard Simm** | senior manager  
PwC  
England

*"Rich's work is excellent and he's always able to make a very difficult subject matter more digestible. Rich is an asset and in my many years of practice I have seldom come across someone who is both as knowledgeable on his subject and as articulate in presenting his views."*

## Accountants



**Nicki Staff** | tax manager

EY  
England



**Trevor Warmington** | director

Rawlinson & Hunter  
England

## Lawyers



**Daria Addison** | senior associate

Charles Russell Speechlys  
England

*"Daria is a well regarded dual qualified Russian lawyer and English Solicitor. She has a growing client base of Russian investors into the London residential property market. She is diligent and hard working with a strong work ethic which is greatly appreciated by the clients she serves."*

### **Tell us about your greatest achievement in 2016/2017.**

I am dual qualified in Russia and England, so whilst I don't limit my expertise to the Russian sector, naturally my focus has always been Russian-speaking clients. Despite changes in the property market, my clientele continues to grow and in 2016/2017 I assisted a number of HNW clients in property deals with a total value in excess of £100 million. These included high-profile acquisitions in prime Central London and in the home counties. Most recent highlight includes being instructed in the purchase of land for redevelopment into luxury accommodation.

### **What Corporate Social Responsibility (CSR) projects are you involved in?**

My family and I are active in the local cub scout pack and we often get involved with various voluntary and charity projects with them. I recently spent a weekend working with the Woodland Trust at their centenary project in Langley Vale, planting trees and teaching the children about nature.





**Claude F W Alleston** | associate solicitor  
Penningtons Manches  
England

*"We were delighted to recruit Claude this year. His reputation for treating clients and colleagues with a natural charm and keen intellect sets him apart from many of his peers in the industry. Claude is a star of the future. His hard work and professionalism are a pleasure to see."*

**Tell us about your greatest achievement in 2016/2017.**

My greatest achievement in 2016/2017 was being offered and accepting a position in the private client department at Penningtons Manches, London.

**What CSR activities are you involved in?**

I am one of the founding trustees of Working Party Theatre Company. TWP is a charity set up in April 2015 to promote and advance education, appreciation and participation in the dramatic arts. We have most recently been using outreach and community work to create theatrical performances. The idea is to bring people together through drama to build relationships and inspire new ways of thinking. We are due to receive several of our largest financial donations from various institutions and other charities this year.



**Fraser Allister** | associate, private client & trust  
Ogier  
Cayman Islands

*"Fraser is an exceptionally talented attorney with good attention to detail and a responsive and helpful approach to his clients. He regards issues pragmatically and is focussed on finding solutions and not on creating problems."*

**Tell us about your greatest achievement in 2016/2017.**

I moved from a private client solicitor's role in Edinburgh to the Cayman Islands. It's been testing both professionally and personally but the rewards of learning the intricacies of a new legal system and way of working have been rewarding.

**What CSR projects are you involved in?**

Ogier in the Cayman Islands does an amount of charity work which is all focussed on projects here in the Islands, from cleaning the roads and beaches for World Earth Day to delivering for Meals on Wheels. We also provide volunteers as mentors for high school students in a project run by Cayman Finance to give high achieving students the chance to experience life and work in professional services. I participate in all of these projects.

**Tell us about any promotion or qualification you achieved last year.**

As well as taking up the position with Ogier, I gained a STEP qualification.





**Tonia Antoniou** | partner

Michael Kyprianou & Co  
Cyprus



**Oliver Auld** | senior associate

Charles Russell Speechlys  
England

*“Oliver Auld is an exceptionally capable and talented lawyer, with impressively sound judgment and a considerable knowledge of trust issues. His advice is always measured, mature and thoughtful, and he projects a natural authority. He is also someone with whom it is a pleasure to work.”*

**What CSR projects are you involved in?**

I volunteer for the befriending service at Age UK Barnet, which involves visiting an older person, resident in my local area once a week. I am currently befriending Iris in Southgate, who is ninety-two years old and housebound. I also volunteer for the Crusoe Club for visually impaired people who attend Blackfriars Settlement in Southwark and for the firm’s student mentoring programme.

**Tell us about any promotion qualification you achieved last year.**

I became a full member of the Association of Contentious Trusts and Probate Specialists last year. I have also been promoted to senior associate in May 2017.



**James Austen** | senior associate

Charles Russell Speechlys  
England

*“I am continually impressed with James’ ability. Not only is he able to analyse problems on an extremely wide range of matters, he is able to develop a clear approach and solution under pressure.”*

**Tell us about your greatest achievement in 2016/2017.**

After nearly seven years’ work on behalf of the trustees of three family trusts, I completed a settlement agreement which we negotiated between the members of a warring family. This successfully brought to an end more than a decade’s bitter litigation. The result was achieved by selling certain assets, reaching agreements with creditors and then dividing the remainder of the estate into unequal shares between three branches of the family. Most importantly for our clients, it has finally enabled them to retire as trustees on the usual indemnities, which was their primary objective. I also became a father and took a period of shared parental leave with my wife and family.

**What Corporate Social Responsibility (CSR) projects are you involved in?**

I am taking part in the firm’s two-day, 160-mile, sponsored bike ride from Cheltenham to London via Guildford in support of the firm’s charity of the year, Carers Trust.





# future

## leaders

A W A R D S

2017

Join us for the Future Leaders Awards cocktail reception on 1 November 2017 in London. Gold, silver and bronze awards will be announced in eighteen categories, including Lawyer of the Year, CSR Initiative of the Year, and Family Office Individual of the Year.



*"The event was well attended and good fun. I met a number of other professionals at a similar level to me and made some good contacts. Winning the award also helped to boost my profile and that of my firm."*

**Edward Porter, senior associate, Michelmores**

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For enquiries, please contact Calin Lapuste  
[clapuste@citywealthmag.com](mailto:clapuste@citywealthmag.com)



**Terence Bennett** | legal director  
Charles Russell Speechlys  
England

*“Terence is knowledgeable and thoughtful in his advice that he carefully tailors to his clients’ circumstances. He combines a talent for thinking of imaginative solutions with thoroughness, reliability and a helpful approach, explaining tricky situations in a way that is easily understood by the non-specialist.”*

**Tell us about your greatest achievement in 2016/2017.**

Reaching an agreement that was very beneficial to our client, with the executors and family of her late partner, without the need to issue proceedings. The disagreements were divisive and wide-ranging, and I drew together a small team of colleagues in other parts of the firm to provide the joined up service this client needed and get her the result she wanted.

**What CSR projects are you involved in?**

Charles Russell Speechlys’ charity of the year is Carers Trust, voted for by the staff of the firm. This is a charity that supports those who care, unpaid, for family members or friends who are ill, frail, disabled or have mental health or addiction problems. A sponsored cycle ride, in which I will participate, will take place over two days this summer, from our Cheltenham office to our Guildford office and then on to our London office.

**Tell us about any promotion you achieved last year**

With effect from 1 May 2016, I was promoted from senior associate to legal director.



**Amelia Beringer** | associate  
Gordon Dadds  
England

*“Since her promotion to associate in 2016, Amelia has continued to thrive in the private client team taking on increasingly broad matters in a competent and efficient manner. She is well respected by colleagues and clients alike for her firm but friendly approach.”*

**Tell us about your greatest achievement in 2016/2017.**

I was selected as the firm’s Globalaw Leadership Programme participant. Globalaw is a top ten law firm network comprised of over 110 law firms in more than eighty-five jurisdictions, Gordon Dadds being the member for England and Wales. It meant I attended conferences in Miami, Amsterdam and Dubai and so expanded my professional network.

**What CSR projects are you involved in?**

I am a trustee of the Gordon Dadds Charitable Foundation (GDCF), a grant-making charity and part of Gordon Dadds’ CSR programme. Staff nominate charities which are shortlisted to receive a grant from GDCF. I also prepared GDCF’s successful Charity Commission registration. GDCF has made several grants to charities. I also sit on the firm’s charity committee which organises fund raising events. I particularly enjoy my role with GDCF which has allowed me to develop management and team-working skills.

**Tell us about any promotion or qualification you achieved last year.**

Promoted to associate in July 2016. Passed STEP Diploma in Trusts and Estates 3rd module – Taxation of Trusts and Estates.



**Jessica Bermingham** | associate  
Charles Russell Speechlys  
England

*"Jessica provides her clients with unlimited dedication at the highest of standards. In a recent very high-value case she provided brilliant leadership, managing both her clients and her team."*

**Tell us about your greatest achievement in 2016/2017.**

I managed a large team of colleagues in relation to a twelve-day trial of a will dispute and application to remove trustees of a multimillion pound estate. I was responsible for management of all aspects of the case leading up to and during trial, including obtaining witness evidence. I was also the main contact for the clients and counsel.

**What CSR projects are you involved in?**

I am involved in Mentoring Works 'step into work' scheme. This involves mentoring a young person, assisting with career development and providing advice for example with interview skills training, job applications and work experience. I am also responsible for directly supervising trainees in my team.

**Tell us about any promotion or qualification you achieved last year.**

I am studying for the STEP diploma in trusts and estates having completed the estate and trust administration modules. I took the trust administration certificate and received a STEP Worldwide Excellence award with the highest mark for this exam in the UK. I am also studying for the ACTAPS qualification for contentious trust and estate practitioners.



**Matthew Braithwaite** | partner  
Bircham Dyson Bell  
England

*"Matt is a very technically sound private client lawyer. From working in both accountancy and law firms he has an ability to apply the law in a practical manner. I would have no hesitation recommending him."*

Future Leaders Awards  
1 November 2017

Book online at [www.citywealthmag.com](http://www.citywealthmag.com)

For enquiries, please contact Calin Lapuste  
[clapuste@citywealthmag.com](mailto:clapuste@citywealthmag.com)





**Daniel Brandon** | associate  
Penningtons Manches  
England

*"Daniel has only been with the team a short time, but has already become an invaluable asset, particularly with the 6 April tax changes. His technical ability and enthusiasm are much appreciated by colleagues and clients alike. He is a pleasure to work with."*

**Tell us about your greatest achievement in 2016/2017.**

Being offered a job with the private client team at Penningtons Manches. I was particularly keen to join a team with plenty of international clients, and, in light of the 6 April 2017 tax changes, to be involved in the restructuring and tax planning advice that the changes required. This has proved to be the case so far, with a wide range of cases including de-enveloping.

**What CSR activities are you involved in?**

Compassion in World Farming, raising awareness about the effect of factory farming on animal welfare and the environment. Growing up on a farm, animal welfare, particularly in relation to those animals we exploit for food, has always been a concern.

**Tell us about any promotion or qualification you achieved last year.**

I achieved the STEP Advanced Certificate in Administration of Trusts as part of my STEP diploma in Tax and Estate Planning.



**James Brockhurst** | senior associate  
Gowling WLG  
England

*"James' practice incorporates a broad range of trust and tax matters. Clients clearly trust him and value his advice. As well as handling a demanding caseload, he is often busy writing articles and doing talks."*

**Tell us about your greatest achievement in 2016/2017.**

Delivering a lecture at a STEP event in Canada.

**What CSR projects are you involved in?**

I help my Parochial Parish Council on some legal and accounting matters.

**Tell us about any promotion or qualification you achieved last year.**

I was promoted to senior associate in 2016. I obtained the STEP FATCA certificate, after obtaining the STEP Advanced Certificate in UK tax for International Clients.



**Imogen Buchan-Smith** | senior associate

Wilson's Law  
England



**Katie Doyle** | associate

Mishcon de Reya  
England



**Lewis Edwards** | associate

Bircham Dyson Bell  
England

*"Lewis has helped me in numerous transactions with private clients, where residency and domicile overlap with tax and estate planning across multiple jurisdictions. His reassuring presence, together with some deft humour, quickly puts clients at their ease. As a young solicitor in this field, Lewis is an outstanding professional."*

**Tell us about your greatest achievement in 2016/2017.**

Receiving the Editor's Choice Award at the Magic Circle Awards in May 2016. It was a complete surprise and a highlight of my career so far. I hold Citywealth in high esteem and it was an honour to be recognised by the editor, Karen Jones, and her team in front of hundreds of other advisers and their clients at the prestigious awards ceremony. It has really boosted my career and opened a number of doors to me, and it has helped me to win a lot of new clients as a result of the connections that I have made.

**What CSR activities are you involved in?**

BDB has a thriving CSR presence and I sit on the CSR committee, helping to formulate the firm's policy and assist in the planning of our activities. In the last few years, we have raised £12,000 for our three employee-nominated charities. Highlights of the programme include our award-winning payroll giving scheme and supporting the Great Legal Bake. We are now working with the non-for-profit organisation Heart of the City to expand our CSR offering, focusing additionally on the environment, improving employee engagement and continuing our work towards a diverse profession.

Future Leaders Awards – 1 November 2017





**Lucy Edwards** | senior associate  
Penningtons Manches  
England

*“Lucy has an innate ability to drill down to the key issues in any client situation, and produce an answer that meets all the questions that arise. She is extremely good at dealing with clients, showing an understanding of their concerns, and inspiring confidence in her ability.”*

**Tell us about your greatest achievement in 2016/2017.**

Last year was one of particular challenge and change in our team. The scale of legislative review, particularly for offshore clients, continues to demand focused and intense work, which we are delivering alongside developing a new cross-department private wealth sector in the firm. However, the greatest challenge has been coming to terms with the death last year of our respected colleague, the firm’s former CEO and my mentor, Lesley Lintott. It has been a real achievement for us to manage the acute loss that we, our colleagues and our clients feel, with the determination and constant good humour that she instilled.

**What CSR projects are you involved in?**

The firm allocates and encourages pro-bono hours each year, which I use to support two places particularly close to my heart. I live in a village that holds a seasonal festival each quarter at which I help and I sit with the Parochial Church Council of a local church as its honorary secretary. I also have family ties to Pembroke in Wales, a town encircled by the walls of a medieval castle and the birthplace of King Henry VII and support the Pembroke Town Walls Trust which works to protect its archaeology.

**Tell us about any promotion or qualification you achieved last year.**

I was promoted to senior associate in April 2016.



**Ravi Francis** | associate  
Irwin Mitchell Private Wealth  
England

*“Ravi has the makings of an exceptional leader. With the work arising from the Finance Act 2017, he has shown the ability to knuckle down and get the job done. With a solid return in terms of hours and bills, not just objectively but also subjectively against peers in the same department, Ravi continues to demonstrate all of the qualities required in a leader.”*

**Tell us about your greatest achievement in 2016/2017.**

Highlights for 2016/17 included advising a Middle Eastern billionaire on structuring a collection of artwork through a Channel Islands private trust company; delivering a broad advisory project for an African client setting up a UK family office; and advising a member of a foreign royal family, on the April 2017 non-dom reforms, focussing particularly on offshore trusts/ foundations and holding structures for UK property interests.

**What CSR activities are you involved?**

I am in training, together with my wife, for a half marathon in 2017, in support of the British Heart Foundation. This is the second fundraising initiative I have been involved in with BHF, which is a charity with a special meaning for me because my father and uncle both died young of heart disease. I am also regularly involved in supporting IM’s sixteen selected charities which include Macmillan Cancer Support, Haven House and Mencap.



**Hannah Gearey** | senior associate  
private client & tax  
Penningtons Manches  
England

*"Hannah stands out for her core attributes which include hard work, organisation and communication skills. She has an expertise in charity law in philanthropy and grant-making charitable entities."*

**Tell us about your greatest achievement in 2016/2017.**

I had my second child in January 2016, and recently returned to work from the end of my maternity leave. Being a working mother and juggling the pressures of a family life has been a huge achievement this year.

**What CSR projects are you involved in?**

Penningtons Manches has recently launched Penningtons Manches Charitable Foundation. This initiative will consolidate the fundraising, pro-bono and voluntary activities and I am involved with charitable work within the private client department. As the Foundation develops, it will support a varied number of projects, the first being action against modern slavery and human trafficking.

**Tell us about any promotion or qualification you achieved last year.**

I was promoted to senior associate in April 2016. This has enabled me to increase my supervisory role for the more junior associates, which is something I enjoy.



**Emma Heelis-Adams** | senior associate  
Burgess Salmon  
England

*"Emma's attention to detail when advising clients means that she consistently provides good quality legal advice. Clients appreciate Emma's calm, efficient and friendly approach and her ability to explain matters in a clear manner."*

**Tell us about your greatest achievement in 2016/2017.**

I am proud of my work in providing extensive advice relating to the re-organisation of the ownership of a client's assets, valued at approximately £35m, which was a result of his divorce, plus his becoming UK deemed domiciled on 6 April 2017. I advised on the tax consequences of transferring investment assets and UK and non-UK real estate on divorce and advised on the new UK rules in relation to offshore trusts.

**What CSR projects are you involved in?**

During 2016 Burgess Salmon supported Julian House, a local charity which provides a range of services to those at the margins of society, particularly the homeless and those at risk of homelessness. We organised a range of events to fundraise for Julian House, raising £68,000 for the charity. I supported a range of activities, including attending 'I'm a Partner Get Me out of Here' and 'Strictly Legal' events as well as busking as part of a choir at Bristol Temple Meads train station and sponsoring various colleagues in individual and group challenges.

**Tell us about any promotion or qualification you achieved last year.**

I was promoted to senior associate on 1 November 2015 and have taken part in the firm's Senior Associate Development Centre and follow-up training sessions. These have been aimed at developing a range of soft-skills, including business development.







**Nicky Howarth** | senior associate  
Burgess Salmon  
England

*"Nicky is highly experienced in divorce settlements with assets like businesses and pensions. Clients and counsel say she is pleasure to work with, with a very practical, solutions-based approach, which gets the best results. She always fights her client's corner, whilst maintaining excellent relationships with fellow professionals."*

**Tell us about your greatest achievement in 2016/2017.**

I acted for a sixty-year-old husband in a divorce from a much younger wife, after a medium length marriage. One asset was the husband's final salary pension worth £3-4 million. I needed to ascertain the extent to which the pre-marriage pension accruals were a factor versus needs of the parties and the most tax efficient way to achieve pension sharing, factoring in tax consequences, such as the lifetime allowance, and the parties' ages. I successfully dealt with the accountants, actuaries and lawyers to achieve the outcome with the husband retaining a significant proportion of his pre-acquired pension assets. My knowledge on pensions in divorce has been recognised by the Resolution's Property, Tax and Pension Committee.

**What CSR activities are you involved in?**

I have been involved in a voluntary duty solicitor scheme at the Bristol family courts providing pro bono legal advice. During 2016, Burgess Salmon also raised £68,000 for Julian House, a local charity which provides support for the homeless. I attended and sponsored a number of events contributing to this worthwhile charity.

**Tell us about any promotion you achieved last year**

I moved to Burgess Salmon in November 2016 and was promoted to a senior associate.



**Josephine Howe** | managing associate  
Ogier  
Jersey

**What Corporate Social Responsibility (CSR) projects are you involved in?**

I sat on the steering committee that oversaw the development and implementation of the new group-wide CSR policy that extends to our business practices and our involvement in the wider communities in which we operate. The new policy created a budget for contributions and up to two days off per member of staff to volunteer with any cause linked to the theme of education. The new policy was launched across our six jurisdictions at the end of last year. In addition, I chair Ogier Jersey's green committee which promotes green practices within Ogier and its status as an eco-active business.

Future Leaders Awards – 1 November 2017



**Steven Hudson** | senior associate  
Harbottle & Lewis  
England



**James Jaffa** | lawyer, superyachts  
Gateley  
England



**Sevyn Kalsi** | senior associate  
Ogier  
Jersey

*“Sevyn is a much-valued member of the team who has grown into his new role quickly. His Spanish language skills are a real asset when dealing with clients from Latin America.”*

**Tell us about your greatest achievement in 2016/2017.**

I have been appointed as the supervisor for trainees in the team. I have also been involved in taking on a sizeable new client, a multi-generation, multi-jurisdiction UHNW family from Asia.

**What CSR projects are you involved in?**

This year, Ogier has instituted a new group-wide CSR strategy involving a budget for contributions and up to two days off per member of staff to volunteer with any cause linked to the theme of education. I was involved in the early stages of discussion about the direction and priorities for the new strategy, which was launched at the end of last year.

**Tell us about any promotion or qualification you achieved last year.**

I was promoted to senior associate last August. Besides my trainee supervisory role, and also in assisting with the training of more junior members of the team, I am taking a larger role in strategic planning and business development within the private client and trusts team.

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**Geoffrey Kertesz** | partner  
Bircham Dyson Bell  
England

*"Dual-qualified, Geoff always brings something extra. He has a keen eye for spotting things other people miss. Tactically savvy, no-nonsense and tough-talking, our clients adore him."*

**Tell us about your greatest achievement in 2016/2017.**

In November 2016, I had three mediations in three weeks. We put in a huge amount of effort before each one and, because of this, each settled on terms favourable to our clients.

**What CSR activities are you involved in?**

I am the leader of the UK alumni association for the University of California at Berkeley. We have 1,200 alumni in the UK and about fifty undergraduate students studying here at any given time. I volunteer at careers days to speak with undergraduates about going into law, run a mentoring programme connecting undergraduates studying here with alumni, and raise money for scholarships for students who could not otherwise afford to study in the UK for a year.

**Tell us about any qualification you achieved last year.**

I became a full member of STEP.



**Charlotte Knight** | senior associate  
Gowling WLG  
England

*"Charlotte has a broad practice, advising on contentious trusts, onshore and offshore, and non-contentious issues of succession, estate and UK tax planning. She has particular expertise in drafting and negotiating nuptial agreements, and lectures on this subject, and builds strong client relationships."*

**Tell us about your greatest achievement in 2016/2017.**

Advising on and preparing a successful application to the courts of an offshore jurisdiction. I also gave a talk in Jersey to an audience made up of experienced lawyers and trustees about the advantages of nuptial agreements and financial disclosure. This provided me with an opportunity to further develop my public speaking and to meet many of my offshore peers.

**What CSR activities are you involved in?**

I have acted as a mentor to a six form student completing her A-Levels.

**Tell us about any promotion you achieved last year**

I was promoted to senior associate.



**Carol-Ann Le Boutillier** | general counsel  
W.F.O. Jersey Limited (a private family office)  
Jersey

*"Hard working, committed and effective. Over the last fifteen years Carol-Ann has become a valued colleague, with an ability to absorb and creatively deal with substantial amounts of often unstructured information. Proactive, pragmatic, reliable and a safe pair of hands. Clients and co-workers think she is great."*

**Tell us about your greatest achievement in 2016/2017.**

I was appointed as general counsel to a private family office with whom I have worked with for over twelve years.



**Benjamin Lister** | senior associate  
Taylor Wessing  
England



**Alfred Liu** | associate  
Gowling WLG  
England

*"I'm astonished by the high level that Alfred works at. He has proven capable of mastering all areas of private client work which is rare for his qualification level. He's excellent at marketing and communicating with clients."*

**Tell us about your greatest achievement in 2016/2017.**

Taking my first steps in public presentations to members of the private wealth community last year was very rewarding. I spoke at a STEP Guernsey Lecture on the global push towards transparency and delivered a presentation in Jersey at a seminar hosted by my firm about the impact of global transparency on the internationally mobile. Both occasions offered platforms for me to develop public speaking skills and engage with a range of professionals within the industry on prevalent and topical issues. They were also great opportunities to finally visit both islands.





**Alexandra McCready** | senior associate  
Schillings  
England

*"Alex is the definitive reputation and privacy lawyer. With an eye for detail, she is very adept at forewarning us about potential threats coming down the line. We can always rely on her to keep us updated and advise on the best strategy for approaching any reputation or privacy issue"*

**Tell us about your greatest achievement in 2016/2017.**

I helped a client counter-strike a dirty tricks campaign as part of a wider international smear campaign. I was responsible for helping the client to obtain actionable evidence revealing the ultimate perpetrator, and have subsequently advised on bringing legal proceedings against those involved. Having worked on the case for many years, I have helped collate the disparate facts and advise on strategy to best achieve the client's objectives. The case itself spans multiple jurisdictions and I am serving as a conduit between the client and his Caribbean Counsel. As a result, the client is now pursuing twenty-eight different lawsuits across four countries.

**What CSR activities are you involved in?**

I head up the CSR programme at Schillings. In the last year, this has seen me lead and implement several projects, including an online child safety training programme for Country Holidays for Inner City Kids (CHICKS), which we raised over £5k for, with Schillings' internal fundraising initiatives, which included an online silent auction.

**Tell us about any promotion or qualification you achieved last year.**

In 2016 I was promoted from associate to senior associate at Schillings.



**Kate Molan** | associate  
Penningtons Manches  
England

*"Kate is rapidly establishing herself as one of the finest young family lawyers of her generation. She is fiercely hard-working and has been praised for her smart, insightful and progressive approach."*

**Tell us about your greatest achievement in 2016/2017.**

Winning the Tomorrow Club Award at the 2016 Citywealth Magic Circle Awards. Citywealth has been of huge value to me as a young professional in the private wealth industry as not only a source of mentoring and advice but also in developing my professional network and wider skills.

**What CSR projects are you involved in?**

I help at the Citizens Advice Bureau. I am also a member of the First Aid Nursing Yeomanry (FANY) Princess Royal's Voluntary Corps, a charitable organisation whose role is to support civil and military authorities, such as the police, in times of crisis.



**Aimee Mitchell** | partner

New Quadrant Partners  
England

*"Aimee excels at finding practical solutions to problems. I admire her clarity of thought and her focus. She is an absolute pleasure to work with."*



**Anna Parker** | senior associate

Foot Anstey  
England



**Mark Pearce** | partner

Irwin Mitchell  
England

*"Mark has both a wealth of technical knowledge and a rare brain to process even the most challenging of client matters but also a clarity of communication that means he is a go-to adviser for investment managers, trustees and accountants and also his fellow lawyers."*



**Edward Porter** | senior associate

Michelmores  
England

*"Edward was formally promoted to senior associate on 1 May 2017. This is a significant milestone in his career and is recognition of his abilities and experience. He is already widely known in the Bristol and wider South-West private client market and is increasing his presence in London and the South-East as well."*

**Tell us about your greatest achievement in 2016/2017.**

I have continued to increase my profile in Bristol and the South-West which has resulted in more referrals from intermediaries and invitations to speak at external seminars.

**What CSR activities are you involved in?**

I am a trustee of a Bristol charity called The SOFA Project which has a turnover of around £1m. The charity promotes re-use and recycling of unwanted or damaged furniture and domestic electrical goods by repairing and donating or selling on to those on low incomes who cannot afford new items. It also promotes the work and social skills of the long-term unemployed and the rehabilitation of serving prisoners by involving them in the work of the charity.

**Tell us about any promotion or qualification you achieved last year.**

I was promoted to senior associate on 1 May 2017.



# Lawyers



**Alexa Saunders** | partner  
Carey Olsen  
Jersey



**Matthew Shayle** | senior associate solicitor, TEP  
Burgess Salmon  
England

*"Matt has become an important part of Burgess Salmon's international private wealth team, working alongside the partners and helping to develop the professional skill sets of the more junior lawyers. He is appreciated by clients and has made significant contributions to new business won by the team."*

**Tell us about your greatest achievement in 2016/2017.**

Having joined Burgess Salmon's international private wealth team in late 2015, arriving from Switzerland, 2016 has been an exciting period in my career. I have had unrivalled support from partners and I am part of an exceptional team of lawyers. All of this alongside the birth of my third child, a home move and a country move has made 2016/17 an achievement in itself.

**What CSR projects are you involved in?**

I took my French horn out of a lengthy retirement to join the firm's brass band, playing carols at Christmas around Bristol for the firm's nominated charity of the year, Julian House, and was part of a team that spent time volunteering to create community gardens for the Avon Wildlife Trust's 'My Wild Street' project.

**Tell us about any promotion or qualification you achieved last year.**

I have been appointed as a representative to the firm's risk and best practice committee on behalf of the private client department.



**Claire Tollefson** | senior associate  
Cripps  
England

*"Claire knows how to get the best for her clients. She has a great eye for the important details in a case and has a real skill of being able to plan tactically when it comes to litigation. She is approachable, gives great advice and is a pleasure to work with. Claire's hard work makes a real difference for her clients."*

**Tell us about your greatest achievement in 2016/2017.**

I acted for a multi-millionaire husband in financial remedy proceedings ancillary to divorce, who was a successful businessman with companies in both the UK and in Europe. Court proceedings were initiated but the process was fast-

tracked by the parties attending a private hearing where a barrister was instructed to act as the judge. This was a tricky case with a number of periphery issues which could have caused the case to become protracted. However, I managed to keep all parties focussed on the key issues and we settled on favourable terms. I also got married in February 2016.

#### What CSR activities are you involved in?

Each year Cripps supports a different charity. In 2016 the chosen charity was the Alzheimer's Society. The firm raised over £16,000 in total, more than in any previous year. The main event was the Olympic themed 'Get Cripps to Rio', which involved our staff walking, running, cycling, rowing and swimming the distance between Tunbridge Wells and Rio de Janeiro. The initiative was awarded a silver medal for 'CSR Initiative of the Year' at the 2016 Citywealth Future Leaders Awards. This year the chosen charity is Teenage Cancer Trust. This is a cause that is close to my heart as there is a long history of cancer in my family. I will actively participate in the planned events, which include a quiz night, a dawn till dusk sports day, and a Cripps 'Triathlon' which will involve organised swimming and cycling events, and walking the Tunbridge Wells circular walk through the High Weald Area of Outstanding Natural Beauty.



**Gemma Townsend** | solicitor

Gilbert Stephens

England

*"I have known Gemma for three years now and in that time she has qualified as a solicitor and now deals with all aspects of private client work. I know her to be hard-working and very organised."*

#### Tell us about your greatest achievement in 2016/2017.

I have recently returned from a trip to Tanzania where I climbed Mount Kilimanjaro using the Lemosho route which is one of the least frequently used paths. This was an amazing experience and I made it to the summit after an eight-hour climb from base camp on day seven, arriving at Uhuru Peak just in time for sunrise.

#### What CSR projects are you involved in?

The YMCA in Exeter.



**Tristram N W van Lawick** | senior associate

Charles Russell Speechlys

England

*"Tristram handles matters efficiently providing clear, practical advice, which is welcomed by clients and their advisers alike."*

#### Tell us about your greatest achievement in 2016/2017.

Successfully concluded the purchase of a small landed estate. There were a number of problems with tenancies that required practical solutions to achieve the client's aims, some of which had to be implemented post-completion as part of a long-term strategy. There were also a few undisclosed matters affecting the estate that came to light at the eleventh hour that needed sensitive and prompt handling. The end result was a successful purchase.

#### What CSR projects are you involved in?

Last year I took part in a firm-led project to rejuvenate the gardens of one of the local care homes in Cheltenham run by the Order of St John. The gardens had become quite overgrown and low on plant stock, so we carried out a Ground Force-like makeover to get them ready for the care home's summer party.





# Lawyers



## Kiran Vasudeva | senior associate

New Quadrant Partners  
England

*"One of the qualities I most value in Kiran is that she is always available to speak to and will sort out problems quickly and sensibly. I have no hesitation in recommending Kiran to other clients and professionals."*



## Sophie Voelcker (née Brandram) | senior associate

New Quadrant Partners  
England

*"Sophie brings a wealth of experience, she is a pleasure to work with and is highly regarded professionally. It is good to know our clients are in the best possible hands."*



## Polly Wilkins | associate

Schillings  
England

*"If you don't want to unexpectedly find yourself in the media spotlight, then it helps to have Polly by your side. In helping businesses and successful individuals to understand and deal with the reputational and privacy issues that have the potential to put them in the spotlight, Polly is well versed at putting in place strategies to help clients better protect themselves"*

### **Tell us about your greatest achievement in 2016/2017.**

In the last year, I have carved a particular niche in helping clients guard against privacy invasion, reputation sabotage and harassment campaigns. Acting for high-profile HNW individuals and their families, with a focus on Asia, I work to help clients identify those who may have something to gain from invading their privacy and damaging their reputation. Using investigation techniques to ethically seek out possible sources of disingenuous information, I'm able to successfully deploy my legal skills to prevent or mitigate the privacy and reputational damage.

### **What CSR projects are you involved in?**

I am responsible for mentoring and training ten paralegals in a range of fields relevant to the business and its day-to-day activities. Outside of work, I devote time to fighting for the rights of children online.



## Claire Yorke | managing associate

Mishcon de Reya  
England

# Financial Advisory & UHNW Services



**Oliver Chew** | associate director  
Stonehage Fleming  
England



**Christopher Yardley** | financial planner  
Strabens Hall  
England

*"Christopher is a hard-working, diligent and meticulous in the pursuit of fair and positive outcomes for his clients."*

#### **Tell us about your greatest achievement in 2016/2017.**

I provided advice and strategy which covered a breadth of financial planning areas, including risk management, cash flow modelling, estate planning, investment advice and debt analysis. Having been in the industry for a relatively short amount of time it was a great honour to be so involved in what was a large and complicated account.

#### **What CSR projects are you involved in?**

I am leading the firm's inter-company charity quiz later this year. We invite private client law firms and donate a sum to a charity. As a firm, we also sponsor six different charities and I may nominate a seventh that is close to my heart.

#### **Tell us about any promotion or qualification you achieved last year.**

I completed both unit 1 and unit 2 of the Chartered Wealth Manager qualification, which is a postgraduate qualification, QCF level-7, the highest level obtainable in UK financial services. Unit 1 covers financial markets and Unit 2, covers portfolio construction theory. Through this qualification I received Chartered Membership of the Chartered Institute of Securities and Investments (CISI).

Future Leaders Awards

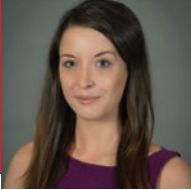
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# Private Bankers, Financial & Investment Managers



**Grace Addison** | vice president & private banker  
Barclays  
England

*"Grace is what I would call a model private banker. I consistently receive positive feedback on her from both clients and colleagues. She manages a diverse team and successfully provides the full wealth of services offered by Barclays to her client book of UHNW individuals and family offices."*

**Tell us about your greatest achievement in 2016/2017.**

I have taken on managerial responsibility for all junior members within my team which includes day-to-day management and personal development.

**What Corporate Social Responsibility (CSR) projects are you involved in?**

A London-based charity called 2nd Chance which works with adults ranging from eighteen to twenty-four who are often from disadvantaged backgrounds and aim to provide them with some of the basic skills they would need to get a job. In 2016 I arranged and presented a half-day workshop on interview skills for thirteen of their trainees at our office in Canary Wharf. Following this, I am also providing one-to-one mentoring with trainees.

I also raised funds to help send nineteen disadvantaged local people, including the disabled and recovering from a serious illness, on a once in a lifetime experience. I joined the four-day sailing voyage with the Jubilee Sailing Trust on a specially designed three-masted Tall Ship in September of this year and spent my time assisting those in need as we sailed from Southampton to Canary Wharf.

**Tell us about any promotion or qualification you achieved last year.**

In 2015 I was promoted to vice president and I am already a CFA Charter holder and a CEMAP holder, plus I continue my annual CPD.



**Zoya Ageeva** | private banker  
Barclays Wealth  
England



**Alessandro Audero** | UHNWI client adviser  
UBS Wealth Management  
England

*"Alessandro is extremely knowledgeable and always available and reactive. He immediately understands clients' needs, is always able to point them in the right direction and is wonderful to deal with."*

# Private Bankers, Financial & Investment Managers



**Thomas Allsup** | assistant portfolio manager  
James Hambro and Partners  
England

*"Tom is a valuable, committed and focused team member who is also personable and popular amongst his direct peers and senior management. His continued hard work and energy will ensure further successes with a commensurate increase in his responsibilities."*

### **Tell us about your greatest achievement in 2016/2017.**

Leading an investment review of a FTSE 100 company culminating in the sale of all discretionary client holdings ahead of a profit warning. Having been a long-term and successful holding for our clients, the company faced growing competition along with increasingly trend and price sensitive customers. Following a face-to-face meeting with the CEO, an appreciation of these growing headwinds drove my recommendation, and subsequent team decision, to sell our client positions outright. The stock has since fallen by over thirty-five percent compared to the FTSE All Share up over twenty percent during the corresponding period.

### **What CSR projects are you involved in?**

My involvement centres on screening all potential purchases to ensure from the outset that they comply with the environmental, social and governance practices we view as pivotal to the integrity of the company.

### **Tell us about any qualification you achieved last year.**

Successful completion of the CISI Level 7 Diploma in Wealth Management in June 2016.



**Emma Bell** | director of partnerships  
SPF Private Clients  
England

*"Emma radiates passion in everything she does and has an incredibly professional 'can do' attitude with a friendly approach. She is quickly able to recognise and adapt to solve intricate scenarios and is well trusted to look after our key partnerships within the business."*

### **Tell us about your greatest achievement in 2016/2017.**

Climbing Mount Kilimanjaro to raise money for charity. It was both mentally and physically challenging but with the support of work, family and friends I made it to the top of the 5895m summit, The Uhuru Peak, and raised over £6000 for Nasio Trust. It was and is an amazing feeling.

### **What CSR projects are you involved in?**

I am co-founder of Ambition First, an organisation run by millennials for millennials, focussing on building a more sustainable and diverse talent pipeline from the ground up. Founded in 2015, with over 3000 members spanning a variety of sectors including financial services, law, professional services and tech, we support members through training and development events, mentoring and a schools and universities outreach programme.

### **Tell us about any promotion or qualification you achieved last year.**

Having achieved my ACII and Chartered Status, I am now working towards my Fellowship which is a long term project that will culminate in a research-based discussion paper being published.



# Private Bankers, Financial & Investment Managers



**Laura Breakwell** | investment manager  
Quilter Cheviot  
England



**Ana Castillo** | asset management assistant  
Banque Havilland  
England

**Tell us about your greatest achievement in 2016/2017.**

The launch of a UCITS fund for retail clients last year, which is still in progress. This is an ambitious project for me and my team. It will provide a new product for a different type of clients.

**Tell us about any promotion or qualification you achieved last year.**

UK Regulation & Professional Integrity Exam (Level 4).



**Samuel Chung** | assistant vice president  
Citi Private Bank  
England

**Tell us about your greatest achievement in 2016/2017.**

I introduced a large family office client to an interesting unlisted high growth company and by closing a private placement deal for the client, set a precedence for a new product program and a new stream of revenue.

**What CSR activities are you involved in?**

Education has always been something close to my heart; my mother was a teacher and I have tutored hyperactive and dyslexic children in the past. I therefore organised and ran an Employability Skills Development Workshop at a local Sixth Form College to help develop students' soft skills. Finally, I take part in the annual JPMorgan Corporate Challenge.

**Tell us about any promotion or qualification you achieved last year.**

I became a CFA Charter holder as of August 2016 and was promoted to assistant vice president from senior associate. I was also invited by the CISI to be an industry specialist and to join the subject panel review.



**Jade Dobber** | associate director  
London and Capital  
England

*“Jade has shown determination and perseverance in the last year. She has been focused on her launch of the women’s family office, while successfully adapting to the private investment office and continuing to lead on the existing investor visa business.”*

**Tell us about your greatest achievement in 2016/2017.**

I am the first individual in the company’s history to have joined London & Capital with no investment experience and now be a fully qualified chartered wealth manager. I hold the Investment Management Certificate and a Diploma for Financial Advisors from the London Institute of Banking and Finance, formally known as the Institute of Financial Services. I completed this in three years whilst also being instrumental in the start-up and success of a new team within the firm. The investor visa team was developed from scratch and now has close to 100 clients from across the globe.

**What CSR activities are you involved in?**

I have attended many Women in Finance summits and events that promote and encourage gender diversity at all levels within businesses. My key initiative this year is to educate the wider community by holding a series of events that are aimed at female professionals. I have been mentoring younger members of London & Capital to help support them through the same journey as myself, including passing exams, growing within the firm and being a support as they transition into the real world of work. Finally, I set up an internship programme for students considering wealth management as a profession to ensure that they have real hands-on experience.

**Tell us about any promotion or qualification you achieved last year.**

I became a chartered wealth manager qualified and regulated to give financial advice. Last year, I was promoted to a different area of the business, the private investment office, where I set up a women’s family office, a new initiative within the firm. The women’s family office provides investment management solutions and financial planning to women, particularly female professionals, entrepreneurs and women post-divorce. Additionally, I am now responsible for looking after the investor visa business within the firm, which is a book of £70m.



**Jessica Fox** | assistant relationship manager  
Seven Investment Management  
England

Future Leaders Awards  
1 November 2017

For enquiries, please contact Calin Lapuste  
[clapuste@citywealthmag.com](mailto:clapuste@citywealthmag.com)



# Private Bankers, Financial & Investment Managers



**Lauren Garey** | banker  
J.P. Morgan  
England

*"Lauren is a natural leader within our business and the industry who is highly regarded by both colleagues and clients. Lauren is known for her relationship building skills, thoughtful advice, and contagious enthusiasm. I feel privileged to work alongside her."*

## **Tell us about your greatest achievement in 2016/2017.**

Taking on a role as the chair of the Diversity Advisory Committee at Founders4Schools, an education-technology charity founded by Sherry Coutu that brings business leaders into schools to unlock the employability of young people. It is a privilege to lead this committee of thirty of the top female leaders and to focus on our key objectives in 2017, which are inspiring more girls into STEM, increasing student and teacher access to more female role models, helping students understand the benefits of diversity, leveraging diversity data for maximum impact, and creating thought leadership publications about female entrepreneurship in the UK.

## **What Corporate Social Responsibility (CSR) projects are you involved in?**

I am passionate about gender equality and focus my CSR commitments on empowering women through three key avenues: education with Founders4Schools; leadership: I am on the board of Groton Women's Network, a member of Ellevest Women's Network, and J.P. Morgan's Women's Network Executive Leadership team, and microfinance: I started my career in Costa Rica providing female entrepreneurs with seed funding, authoring a report measuring the economic impact of microfinance in India, and creating a micro-fund to support small businesses in Ghana. I continue to be involved in microfinance initiatives to support female entrepreneurs.

## **Tell us about any promotion or qualification you achieved last year.**

I was promoted to vice president at J.P. Morgan.



**Camilla Klemme** | investment manager  
Rathbone Investment Management  
England

*"Camilla has played a major role in assisting the team with business development and is now taking on her own clients. She has dealt impressively with the pressure of managing a sizeable book of wealth during the political turmoil of Brexit and the US Election. Her passion for investment, along with a good understanding of economics has stood her in good stead."*

## **Tell us about your greatest achievement in 2016/2017.**

I have been part of the overseas equity investment committee since its inception, choosing and monitoring stocks which are recommended to investment directors across Rathbones. I have been asked to be the lead female 'up and coming' investment manager to expand the Rathbones brand into the female entrepreneur world, working with the new private office to build relationships with extremely well known and successful female CEOs. This has involved sponsoring both a client event including the launch party of a start-up and other entrepreneur focused events.

# Private Bankers, Financial & Investment Managers

## **What CSR activities or projects are you involved in?**

I was part of the Rathbones cycle to Paris team alongside with Catley Lakeman for Cure Leukaemia. We cycled over 500km in four days, raising over £10,000 in 2016. I was also part of the Rathbones four-member ski team, taking part in the Business Challenge for Skiing with Heroes, a wounded veterans charity, involving both a marathon and slalom race, raising over £20k in 2017. Additionally I help support the National Schools Lacrosse Tournament, having been a county player for three years at school. Finally, I present to schools, including clients, through the Rathbones financial awareness programme.

## **Tell us about any promotion or qualification you achieved last year.**

I was promoted to investment manager in 2016 after joining Rathbones in 2011 as a graduate.



**David Kness** | investment manager  
Rathbone Investment Management  
England

*"David's professionalism, work ethic, initiative and ambition have been the primary ingredients of his investment management career to date. He provides an excellent service to his clients, demonstrating his dedication to them and the firm. He is also shown his commitment to the wider community through his initiative in establishing and growing Winchester Young Professionals and presenting the Rathbones Financial Awareness course to young people in the region."*

## **Tell us about your greatest achievement in 2016/2017.**

In 2017, a networking group which I originally founded and continue to run, will reach its fifth year anniversary. The group, Winchester Young Professionals (WYP), has over 120 people involved from a range of professions including solicitors, barristers, accountants, entrepreneurs, business owners and architects. We run quarterly events, hosted by various companies and have included croquet evenings, curry suppers, quiz nights, a Bombay Gin tour, and wine tasting.

## **What CSR activities are you involved in?**

One project that I am running in Hampshire is to deliver our financial awareness course entitled 'Your Money, Your Future' to people aged between sixteen and twenty-four. This one-day free course is delivered to schools and to individuals at our office, with the aim to prepare the next generation for the financial decisions they will have to make.

## **Tell us about any promotion or qualification you achieved last year.**

I now chair our regional investment meeting which is held on a weekly basis and incorporates the discussion of investment ideas, trades, micro and macroeconomic themes, as well as regional activities.

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# Private Bankers, Financial & Investment Managers



**Samuel Lush** | executive adviser  
KPMG UK  
England

*"Sam has a wonderful nature and a very good City radar with a real penchant for networking and bringing colleagues, friends and potential business together. I can certainly see that Sam is one of the brightest young talents in the City today and he has an incredible future ahead."*

### **Tell us about your greatest achievement in 2016/2017.**

I am currently working between Zurich, Singapore and London advising a global bank and wealth manager. It has, so far, been a challenging but rewarding piece of work and has given me great insight into the priorities for wealth managers in the coming years.

### **What CSR projects are you involved in?**

KPMG is involved in the implementation of the UN's Sustainable Development Goals and has a coordinated CSR team which focuses on social mobility issues. Personally, I sit on the advisory board for the City Funding Network and am actively involved in Sapere, a charity which funds teacher training for the Philosophy for Children (P4C) programme. P4C encourages open enquiry into social issues. The charity works with children aged three to eighteen. I have helped to fund training for three schools in deprived areas. Also, I am working on developing a 'Philosophy for Business' programme, using the principles of P4C to solve business issues.

### **Tell us about any qualification you achieved last year**

I am currently studying towards Level 2 of the CFA Program, having completed Level 1 last year.



**Archie MacLellan** | investment manager  
Canaccord Genuity Wealth Management  
England

*"Archie is competently building and developing his experience with clients, whilst also gaining post-graduate level qualifications; giving him a firm and promising foundation for a career within this industry."*

### **Tell us about your greatest achievement in 2016/2017.**

Building and developing a completely new relationship with a firm of solicitors whom I met through the Citywealth Tomorrow Club, a networking club for junior professionals, and Canaccord Genuity Wealth Management. This initiative has led to successful introductions of business in both directions.

### **What CSR activities are you involved in?**

I am part of a group who are volunteering to help children at secondary schools in London, which are in deprived areas. The aim is to educate young people about the opportunities open to them in finance, and the routes they can go down to achieve new goals, while also painting a picture of the skill sets I use.

### **Tell us about any promotion or qualification you achieved last year.**

I passed the Financial Markets paper of the CISI Chartered Wealth Management qualification. I was one of only three candidates to achieve a merit with no distinctions awarded. This acts as the first of three exams I am sitting to achieve Level 7 Chartered status, with the next Portfolio Construction Theory exam being in June 2017.



**Jessica Metcalf** | head of investor relations  
WH Ireland  
England



**Jonathan Moon** | client director  
Close Brothers Asset Management  
England

*"Jonathan combines charm and professionalism as well as anyone I have met. His technical knowledge is matched if not exceeded by his ability to make those around him feel comfortable and want to listen to him. Nothing ever seems to be too much to ask."*

**Tell us about your greatest achievement in 2016/2017.**

Sourcing, writing the proposal to accompany and pitching for a considerable charity mandate, which ultimately became one of the largest wins that year. The charity had been with the incumbent for almost a decade and at the beginning of the process had had no interaction with Close. By going through a process of getting to know the charity aims, objectives and sensitivities, I was able to put together a pitch and team that secured us a victory.

**What CSR activities are you involved in and why?**

We offer a Trustee Leadership Programme which I help to run and have developed nationally. It is an education programme for trustees of the future that teaches them their responsibilities as trustees and matches them to charities with current vacancies. Having been successful in London, we have expanded the initiative out to Manchester and Bristol.

**Tell us about any promotion or qualification you achieved last year.**

Having let three years expire since passing the CISI Masters in Wealth Management with Merit, last year I enrolled into the CFA programme and am sitting the Level 1 exam in June.



**Joshua Oakley** | assistant fund manager, fixed income  
Waverton Investment Management  
England



# Private Bankers, Financial & Investment Managers



**George Palmer** | portfolio manager  
Waverton Investment Management  
England

*“George is making an outstanding contribution to stock selection at Waverton, particularly in Japan where his ideas have made a very clear contribution to our performance. His passion for stock research shines through and his accounting background is an advantage.”*

**Tell us about your greatest achievement in 2016/2017.**

At the beginning of 2017, I took on co-managing the Waverton Global Equity Fund, the purest representation of our investment style and global best ideas. It's a big step up in that it is a publicly available fund, more visible and subject to more scrutiny but in other ways it is just an extension of what I'm doing for the rest of my clients, which is trying to own the highest quality long-term investment opportunities, buy them at reasonable valuations, and keep risk of absolute capital loss low. My regional research specialism is Japan and I have around 200 Japanese company meetings a year.

**Tell us about any promotion or qualification you achieved last year.**

Having previously trained as an ACA, I passed three levels of the CFA at the first attempt. The last of these was sat in June 2016 and I received my charter in the autumn.



**Michael Rogers** | associate  
Ogier  
Guernsey

*“Michael has added significant offshore litigation experience to the dispute resolution team since he joined the firm at the start of the year, particularly in the area of restructuring and insolvency work, where his qualifications are an asset.”*

**Tell us about your greatest achievement in 2016/2017.**

Since joining Ogier at the start of this year, I have advised a Swiss bank and provided expert evidence to the courts in Zurich about Guernsey trust law and the interpretation of various documents. I am also part of a team which is defending an international trust company against various alleged regulatory breaches. Our most recent instructions include cross-border contentious insolvency work focused on Guernsey.

**What CSR activities are you involved in?**

I am involved with a charitable organisation that supports several Guernsey charities and as the father of a young child, I support charities associated with young children and especially those with a disability.

**Tell us about any promotion or qualification you achieved last year.**

I have qualified as a solicitor in England and Wales, which along with my existing qualification as a South African Attorney means that I am dual-qualified, which is a particular advantage in cross-border disputes. I have been practising in Guernsey for five years and am currently studying towards a set of further qualifications.

## Private Bankers, Financial & Investment Managers



**Oksana Torbych** | private banker  
Barclays Private Bank & Overseas Services  
England

*"Oksana is personable, diligent and efficient. She delivers excellent service to her clients in a warm and confident manner. These attributes mean that Oksana builds strong relationships with clients, colleagues and industry professionals."*

### **Tell us about your greatest achievement in 2016/2017.**

I mentor junior colleagues internally in Barclays as well as externally. Two colleagues have received well-deserved promotions to private banker with my support. I also won the silver award in the category 'Private Banker/ Investment Manager of the Year: Institutional' at the Citywealth Future Leaders Awards 2016; and the silver award in the category 'Rising Star' at the Powerwomen Award which took place in February 2017.

### **What CSR projects are you involved in?**

I am a member of Barclays Win which organises events and initiatives to support, develop and empower women across the bank. Win engages women and men across the organisation to attract, develop and retain women at all levels.

### **Tell us about any promotion you achieved last year**

I secured my promotion to vice president at Barclays.



**Rebecca Tunstall** | investment manager  
Rathbone Brothers  
England

*"Rebecca is a highly effective member of our team, who is passionate about searching out the best investments for our clients, whether they are domestic or international in their outlook. She always sees issues from the client point of view, in order to act in their best interests, paying attention to all of the complexities and detail that is so important when delivering top quality service."*

### **Tell us about your greatest achievement in 2016/2017.**

I have been working on three projects. Firstly, broadening our international strategy and proposition, secondly creating an investment guide targeted at parents investing for their children and finally, creating an initiative to engage with young female entrepreneurs.

### **What CSR projects are you involved in?**

I act as a mentor, helping graduates learn more about the investment industry. Additionally, as a mother, I know the importance of helping parents and children alike to better understand investing and the options available. This includes supporting Rathbones school initiative as well as writing an investment guide for parents.



# Private Bankers, Financial & Investment Managers



**James von Simson** | investment director  
Tilney  
England

*“James has shown on numerous occasions that, in addition to his unquestionable knowledge of the market, he possess the rare ability to understand what clients actually want as opposed to, sometimes, what they think they want.”*

**Tell us about your greatest achievement in 2016/2017.**

Helping successfully integrate a forty-five-person firm into a 400-person firm, then into a 1,300-person firm in the space of six months.

**What CSR activities are you involved in?**

Tilney has a charitable foundation that is funded by the company and employees through give-as-you-earn. We support a range of groups and organisation in the local communities. From the arts, we have board positions with Glasgow Art Club and the Centre for Contemporary Art, to helping young people learn new skills to providing expertise for social entrepreneurs through UnLtd, a UK network of professionals who volunteer time and expertise to support social entrepreneurs.

**Tell us about any promotion or qualification you achieved last year.**

In 2016 I was promoted to investment director and completed part one of four of the STEP International Trust Diploma. This year I will become a STEP Technician and next year a TEP.



**Lucy Walter**  
assistant director, investment management  
Brewin Dolphin  
England

*“I have worked with Lucy for six years. She was made the youngest assistant director within Brewin Dolphin and demonstrates exceptional ability. During her time, she has been instrumental in building one of the largest investment management teams within the company.”*

**Tell us about your greatest achievement in 2016/2017.**

Being promoted to assistant director at Brewin Dolphin. I was put forward for the promotion and had to deliver a presentation on how my business development activities contribute to my team's and Brewin Dolphin's growth strategy, followed by an interview by senior directors. I was thrilled to be promoted from investment manager following this and to achieve recognition for my networking activities, such as the Citywealth's Tomorrow Club, and my recent successes in growing FUM at Brewin Dolphin. I am the youngest assistant director in Brewin Dolphin's London office.

**What Corporate Social Responsibility (CSR) projects are you involved in?**

I am involved in a new internal mentoring scheme at Brewin Dolphin as a 'reverse mentor' and am a mentor to one of our senior directors. The senior director and head of one of our regional offices requested a 'reverse mentor' to learn more about how Brewin Dolphin can engage with future generations. I am also a committee member of the 'Women @ Brewin' committee.

## Private Bankers, Financial & Investment Managers



**Gemma Willingham** | senior associate  
Baker McKenzie  
England

*"Gemma is an exceptionally skilled and diligent litigator. She gets to the heart of client's concerns and works collaboratively to develop solutions which fit clients' strategic objectives. Clients love her for her sharpness of mind, her work ethic and her ability to 'speak human' to them on complex issues of trusts litigation."*

### **Tell us about your greatest achievement in 2016/2017.**

I was awarded the Editor's Choice Award at the 2016 Citywealth Future Leaders Awards. The editor of Citywealth, Karen Jones, selected me for this accolade and described me to the assembled guests as an outstanding all-rounder who has everything a person could need to work in and succeed in the wealth management industry.

### **What CSR projects are you involved in?**

I regularly advise a variety of pro-bono clients on matters ranging from death row appeals to advising a major charity on its response to a public consultation. I am also a keen participant in Baker McKenzie's CSR projects, including using volunteer days at Richard House Children's Hospice.



**Lara Wulwik (nee Phillips)** | partner  
Simons Muirhead & Burton  
England

Future Leaders Awards  
1 November 2017

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# Trustees



**Greta Allman** | senior trust manager  
Saffery Champness  
Guernsey

*"Greta not only provides an invaluable support to me regarding business development and management, but more importantly the management of the client team and administration that looks after our Middle Eastern ruling family client structure. She demonstrates professionalism, providing a highly proactive, thought-led, high quality and efficient service."*

**Tell us about your greatest achievement in 2016/2017.**

I was promoted to senior trust manager in January 2017. In the last year, I have become more involved in business development and participated in a winning pitch for a structure owning substantial art and antiques.

**What CSR projects are you involved in?**

Saffery Champness continues its sponsorship of the Saffery Rotary Walk, Guernsey's only around the island walk. This will be the fourth year we have been involved in the initiative. We have helped raise more than £100k for a range of local charities and community projects over three years. On a personal note, I took part in the thirty-nine-mile challenge last year and helped to raise the record amount of £57k.



**Hannah Bisson** | manager  
Butterfield Trust (Guernsey)  
Guernsey

*"Hannah demonstrates maturity and expertise beyond her years combined with a keen intellect and professional approach to her career."*

**Tell us about your greatest achievement in 2016/2017.**

Working with the Group's Asia strategy over the past year. This has involved maintaining relationships with existing clients and travelling to Hong Kong to build and establish relationships. An achievement of note in this regard was the onboarding of a large, fiduciary and corporate structure. I also wrote presentations for wealth managers based in the region to educate them about fiduciary structures.

**What Corporate Social Responsibility (CSR) activities are you involved in?**

I volunteered to assist in the restoration of the Mirus Battery in Guernsey, which is a German fortification built in 1941. This is so that the Battery and tunnels can be opened up to the public.

**Tell us about any promotion or qualification you achieved last year.**

I was promoted to manager in 2016 and I am now responsible for a client-facing team within Butterfield Trust (Guernsey). I manage and oversee the administration of a range of fiduciary, corporate and institutional structures including a separately licensed and regulated investment company.



**Donna Brehaut** | trust manager  
Nerine Group of Fiduciaries  
Guernsey

*"Donna has had a great year winning a Citywealth award and being promoted to trust manager. These well-deserved accolades are reflective of the hard work and commitment she has demonstrated over the last ten years. She is a great manager, team player and crucial member of the team."*

**Tell us about your greatest achievement in 2016/2017.**

I was promoted to trust manager at Nerine in December 2016 after three years working as assistant trust manager. I now oversee an administration team dealing with global HNW clients and family structures with a particular focus on international clients and succession planning. I also won 'gold' at the 2016 Citywealth Future Leaders Awards for Boutique Trustee of the Year.

**What CSR projects are you involved in?**

Nerine's has sponsored the Nerine Netball Club for a number of years and I act as a volunteer to coach sessions for girls aged eleven to nineteen on a weekly basis. I am passionate about netball and play an active role in the Club as well as spending my free time assisting in mentoring umpires.

**Tell us about any promotion or qualification you achieved last year.**

I became a member of the Chartered Management Institute having completed the Level 5 CMI certificate, which is a degree-equivalent qualification. This has played a part in my growth within the trust industry and in developing my management skills.



**Karen Burton** | manager, private client services  
JTC Group  
Jersey

*"Karen is an outstanding client-oriented professional with a bright future ahead of her. We look forward to watching her continued development as part of the JTC family over the coming months and years."*

**Tell us about your greatest achievement in 2016/2017.**

I was promoted to manager on 1 July 2016, taking on a team of four people with varying levels and skills ranging from assistant trust officer to senior trust officer.

**What CSR projects are you involved in?**

JTC is a supporter of local and global charities. I also help out at my son's football club throughout the football season when they host tournaments for the 'Minis' which are school kids. Finally, I recently helped hand out programmes at the Oscar Maclean Foundation event at the Jersey Opera House. The charitable event, entitled 'Night at the Spanish Oscars', was held on 31 January in conjunction with St Michaels School.

**Tell us about any promotion or qualification you achieved last year.**

I successfully passed my CMI Level 3 Certificate in Coaching and Mentoring in 2016.





## Trustees



**Amy Collins** | client director

Ocorian  
Jersey



**Danielle Cottignies**

assistant manager, family office services  
Crestbridge  
Jersey

*"Danielle is an intelligent and articulate member of the family office team. She manages two large family office structures for Middle Eastern clients that involve multiple asset classes, sharia compliance and jurisdictional issues. These structures require a high level of adaptability and resilience because of short deadlines, multiple advisers and the amount of transactions."*

**Tell us about your greatest achievement in 2016/2017.**

Managing a team of my own, after my recent promotion. The team is set to double by the end of the year. At the same time, I'm continuing to increase my client portfolio with a combined value of over US\$1bn of AUA, in addition to working on a number of key transactions with other Crestbridge departments, such as real estate.

**What Corporate Social Responsibility (CSR) projects are you involved in?**

I'm a keen supporter and helper in fundraising for our chosen Crestbridge charity. Last year the business raised and donated over £20K to the Jersey Alzheimer's Association and raised awareness of the disease through fundraising and educational sessions for staff.

**Tell us about any promotion or qualification you achieved last year.**

This year I have been promoted to assistant manager and have been given a team to manage and mentor. Since completing the CISI Islamic Finance Qualification last year, I have also been building on my experience and knowledge of sharia financing through my day-to-day work and client interaction.



**Debby Davidson** | group business development  
director, Asia

Equiom Group Asia  
Hong Kong

Future Leaders Awards – 1 November 2017



## Darren English

director – private client services, Jersey  
JTC Group  
Jersey

*“Darren is a valued, well-respected and highly experienced member of the team. He has a solid client base and I’m always impressed by his professionalism and ability to manage his team whilst acting as a very successful ambassador for the fiduciary business.”*

### **Tell us about your greatest achievement in 2016/2017.**

In January 2017, I clocked up twenty years of continued service, starting in the mail room at seventeen years of age. I progressed through the ranks, taking a year out to travel in 2003, to the position of client director, having successfully completed the ACCA and STEP qualifications.

### **What CSR activities are you involved in?**

I was part of the JTC Rowathon team in support of the MacMillan Cancer Charity in Jersey, which won for the third time. We shall be aiming to retain our title in April 2017.



**Nick Ford** | senior trust manager  
Saffery Champness Registered Fiduciaries  
Guernsey

*“I have worked closely with Nick during his seventeen+ years with Saffery Champness and have witnessed his development into a prominent figure within the firm. Nick manages one of the firm’s five fiduciary teams and his recent promotion is a reflection of his professional ability and involvement in the future development of the firm.”*

### **Tell us about your greatest achievement in 2016/2017.**

Being promoted to senior trust manager was a highlight. Over the last year, I have increased my involvement in firm’s marketing and business development activity. Consequently, I have been involved in several pitches for new business and this has resulted in client wins.

### **What CSR projects are you involved in?**

Saffery Champness continues its sponsorship of the Saffery Rotary Walk, Guernsey’s only around the island walk, for a fourth year. We have helped raise more than £100k for a range of local charities and community projects over three years. On a personal level, I am involved in Guernsey’s Parkrun initiative along with work colleagues and my daughter, and volunteer on Saturday mornings to help with the marshalling, time-keeping and scanning.

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## Trustees



**Emma Furzer** | senior trust officer  
Fairway Trust  
Jersey

*“Emma is an asset to our team and a future leader of our business. She has a wide range of experience and is keen to continually grow and develop her capabilities. She is well respected by her colleagues, peers and clients alike.”*

### **What Corporate Social Responsibility (CSR) projects are you involved in?**

I am directly involved in a number of CSR projects, one being raising money for a local children’s charity, Brigg-Don, which supports around 300 vulnerable children and young people, some of whom are in residential foster care. We are undertaking a gardening project this spring at one of the children’s homes, raising funds by organising an Easter raffle, cake sales and dress down days. I am also taking part again this year in the Jersey marathon relay race, the funds raised support MacMillan Jersey amongst others.

### **Tell us about any promotion or qualification you achieved last year.**

I obtained the Diploma in ICSA last year. I am looking forward to starting a new more management-focused course this year and in the meantime I have enrolled in a course to learn Spanish.



**Elaine Graham** | head of employer solutions  
Zedra  
Guernsey



**Colin Gregory** | managing director  
Equiom Malta  
Malta



**Paulina Harvey** | manager, private client services  
JTC Group  
Jersey

*“Since joining JTC in 2010 Paulina has successfully demonstrated her commitment, experience and management skills. She puts every effort into her studies which is clearly paying off, and her drive and determination to succeed will place her in good stead to develop her career even further over the coming years.”*

## What CSR projects are you involved in?

I have always been involved in events promoting Jersey's local makers and producers by running a pop-up yurt café. I also organised our company's team for a local event called the 'Silkworth Challenge' and we managed to raise over £500 in support of the charity which assists people in Jersey in overcoming addictions.

## Tell us about any promotion or qualification you achieved last year.

I have successfully passed two modules of the ICSA Chartered Secretary Qualifying Scheme in 2016. I am also due to complete a management course.



**James Le Page** | manager  
Butterfield Trust (Guernsey)  
Guernsey

*"James is a highly capable and practical trustee. He has a pragmatic and meticulous approach in ensuring that the administration of our various trusts and businesses is always well taken care of. Despite a reasonably difficult structure, James takes on all tasks with a sensible degree of professionalism and enthusiasm. We know that our matters will be well handled."*

## Tell us about your greatest achievement in 2016/2017

I gained more exposure and stepped up to become one of the primary contacts for large family office structure, assets totalling \$800m, which has a wide variety of assets and a complicated tax structure. This led to me being recognised as a key member of the Butterfield team.

## What CSR projects are you involved in?

I run a community theatre group for young people aged between six and eighteen. We entered Guernsey's local One Act Play Festival winning eight awards, including best under 21's play, best upcoming actors and magic moment of the entire festival.



**Nicola Mauger** | relationship manager  
Butterfield Trust (Guernsey)  
Guernsey

*"A diligent and highly professional individual who demonstrates exceptional client relationship skills whilst balancing the ever increasing risk and operational requirements."*

## Tell us about your greatest achievement in 2016/2017

I won the silver award at the Citywealth Future Leaders Awards in the Business Services category. The award has boosted my confidence and is a great talking point with many of my clients.

## What CSR projects are you involved in?

I mentor the junior members of our team. Having progressed from a trainee position myself I enjoy sharing my knowledge and helping those just starting out on their journey.

## Tell us about any promotion or qualification you achieved last year.

In 2016, I was promoted to a trust manager within Butterfield.



## Trustees

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**Jonathan Melamet** | accounts executive  
HMSA  
England



**Joanne Morse** | senior trust officer  
Summit Trust International  
Switzerland

*"Jo is always very easy to work with, responsive, organised and efficient. She is also thorough and on top of the detail while having a clear understanding of the client's ultimate objectives."*

**Tell us about your greatest achievement in 2016/2017**

At the beginning of 2017, I became a team leader.

**What CSR projects are you involved in?**

Summit sponsors the Miracles Charity. Its mission is to help and finance the running of a centre for Prosthesis and Care based in Mostar, Bosnia-Herzegovina. The Centre provides prosthetic care to land mine victims and disabled citizens. We attend fundraising events for the Charity and this worthy cause helps to give children the chance of a normal life in school and sports and all amputees the opportunity to find work and provide for their families.



**Chris Mourant** | senior trust officer  
Fairway Trust  
Jersey

*"Chris is a motivated individual who excels in every aspect of his role, in particular developing business with our clients in the Middle East and the UK. He has all the right attributes required to help take the business forward and has all the makings of a future leader."*

**Tell us about your greatest achievement in 2016/2017**

In terms of work I reached our team financial goal by travelling to the Middle East and speaking to some of the biggest families in the UAE. Away from work one of my greatest achievements was to represent the Jersey senior men's football team.

**What CSR activities are you involved in?**

We are supporting a local children's charity this year. Brig-y-Don Children's Charity who work with 300 vulnerable children and young people some of whom are in residential foster care. We will be doing a gardening project in the spring at one of their children's homes and raising money through an Easter raffle, cake bakes and dress down days. As a firm we will also be taking part in charity events around the island. Away from work my family raise money for Jersey Hospice Care.

**Tell us about any promotion or qualification you achieved last year.**

I was promoted to senior trust officer in February last year.





**Paul Tucknot** | managing director  
Saffery Champness  
Switzerland



**Clare Usher-Wilson** | director  
Summit Trust International  
Switzerland  
*"Usher-Wilson is the up and coming generation arrived early."*



**Naro Zimmerman** | trust manager  
Nerine Group of Fiduciaries  
Guernsey

*"Naro has amassed vast expertise over eleven years. He wins clients' confidence and maintains first-class service. He works well independently and is hungry to pursue BD opportunities. He actively works with and motivates younger members of the team and is an example for the next generation of trust practitioners."*

**Tell us about your greatest achievement in 2016/2017**

Over the past year, I assisted in doubling the firm's total revenue for the Middle East region. I have also recently been appointed to the Guernsey Finance MENA steering committee as an acknowledgement of my work in this area.

**What CSR activities are you involved in?**

The Eleanor Foundation for road safety which raises money for people less fortunate to build sustainable lives. I have been involved in a number of events as well as independently raising money and volunteering. Most recently, together with other Nerine volunteers, I assisted with the 'Bikes to Africa' scheme, dismantling and loading second-hand bikes into containers ready for shipment to African communities.

**Tell us about any promotion or qualification you achieved last year.**

I have been promoted to trust manager. I also achieved the bronze award for the Business Services Individual of the Year in the 2016 Citywealth Future Leaders Awards.

Future Leaders Awards – 1 November 2017

For enquiries, please contact Calin Lapuste  
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