Welcome to Euromoney’s 13th annual Private Banking and Wealth Management Survey.

This questionnaire contains two parts:

**Part 1 - Nominations**

**Questions 1 to 15:** to be filled out by a maximum of three senior private bankers/wealth managers per firm, per country. Your responses to these questions will be used to produce the survey rankings and contribute to your own score in categories where your peers have nominated you. Please provide country-specific votes.

**Part 2 - Market feedback**

**Questions 16 to 28:** we would like to hear your views on the latest developments in the market. Your responses to these questions are of editorial interest and will not be scored for the survey rankings. They may only be used in an aggregated format and will remain non-attributable to you or your organization at all times.

Please submit your response as soon as possible and no later than Friday, October 23rd, 2015. None of the questions are compulsory, so please only answer the ones you feel knowledgeable about. Any queries should be addressed to Kalin Trifonov - ktrifonov@euromoney.com

Please select the country for which you are most qualified to provide opinions:

--Click here--

if other (please specify)
Private Banking and Wealth Management Survey 2016

Your details

First name: 
Surname: 
Company name: 
--Click here--
If your firm's name is not on the list above please type it below.
Name of local subsidiary if applicable: 
Your department: 
Professional email address: 
Telephone (inc. country & city codes): 

Which of the following best describes your job title?

- Country Head of Private Bank
- Regional Head of Private Bank
- Relationship Manager
- Product Structurer
- Country Head of Marketing/Communications
- Regional Head of Marketing/Communications
- Country Head of Business Development
- Regional Head of Business Development
- if other (please specify) 

Please tick the box below if you wish to receive free access to euromoney.com for the month of February 2016 where the main results of this survey will be published.
Results access: 

Please tick below if you would like to receive further information on the products and services of Euromoney Institutional Investor PLC.
Further Information: 

Data Protection

If temporary access to Euromoney.com is requested above, we will email you to inform you how to access the site and to confirm when your access will expire.
If you have requested to receive more information from our group companies, the information you provide will be safeguarded by the Euromoney Institutional Investor PLC group and will only be used to contact you regarding products and services within the group. We will not transfer this data to any other companies/third parties.
You may be contacted by Euromoney in order to verify your vote regarding this survey (only).
Any data you provide will be used in an aggregated format only and will remain non-attributable to you or your organization at all times. Information around this survey should not be relied upon exclusively as the survey information only serves as a proxy for trends in the major areas of the activity polled.
All data and materials around the survey are the property of Euromoney and can only be used with the express permission of Euromoney.
This will not affect how other information you provide or have provided to Euromoney Institutional Investor PLC group is used. This data is CONFIDENTIAL by the terms of the UK Data Protection Act 1998.
We will now ask you which of your competitors are best at providing certain services. When you nominate your competitors for services you provide, you will also increase your own institution’s score.

You should not nominate your own firm in this section - self-nominations will be removed from the results and may invalidate your vote. Your score will increase automatically when you nominate your peers for competitive products and services.

Don't worry if you can't answer all the questions - we still very much value your opinion. Please leave blank any categories that you are unsure of or that aren't applicable.
Private Banking and Wealth Management Survey 2016

PEER NOMINATIONS SECTION

Among providers in: Your Country

Please nominate the top three firms, excluding your own, in the following categories:

1) Best Private Bank/Wealth Manager Overall:

|   |   
|---|---
| Best: | --Click here-- 
| Second: | --Click here-- 
| Third: | --Click here-- 

2) Best Private Bank/Wealth Manager for Ultra High Net Worth clients (US$30m+):

|   |   
|---|---
| Best: | --Click here-- 
| Second: | --Click here-- 
| Third: | --Click here-- 

3) Best Private Bank/Wealth Manager for High Net Worth clients (US$5m to US$30m):

|   |   
|---|---
| Best: | --Click here-- 
| Second: | --Click here-- 
| Third: | --Click here-- 

4) Best Private Bank/Wealth Manager for Super Affluent clients (US$1m to US$5m):

|   |   
|---|---
| Best: | --Click here-- 
| Second: | --Click here-- 
| Third: | --Click here-- 

Back  Next/Save>>

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PEER NOMINATIONS SECTION

Among providers in: Your Country

Which firms, other than your own, are the best providers of the following products and services for private banking clients?

5) Asset Management

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6) Investment Banking Capabilities

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7) Commercial Banking Capabilities

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8) Family Office services (either independent or department)

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Private Banking and Wealth Management Survey 2016

PEER NOMINATIONS SECTION

Among providers in: Your Country

Which firms, other than your own, are the best providers of the following products and services for private banking clients?

9) Research and Asset Allocation Advice

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10) Philanthropic Advice

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11) SRI/Social Impact Investing

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12) International Clients (serving domestic clients that require access to global markets and global banking)

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### PEER NOMINATIONS SECTION

Among providers in: **Bangladesh**

**13) Succession Planning Advice and Trusts**

- **Best:** --Click here--
- **Second:** --Click here--
- **Third:** --Click here--

**14) Please nominate the Best Private Bank for Innovation in Technology in terms of:**

- **Client Experience**
  - **Best:** --Click here--
  - **Second:** --Click here--
  - **Third:** --Click here--

- **Back Office Systems**
  - **Best:** --Click here--
  - **Second:** --Click here--
  - **Third:** --Click here--

**15) Please nominate the Best Private Banking CEO (excluding your own firm’s)**

Please enter in the format *[First name Surname]*

- **Bank name:** --Click here--

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MARKET FEEDBACK SECTION

16) Compared with 2015, do you anticipate in 2016 your firm’s private banking/wealth management revenues will be:
- Higher
- Lower
- The same

17) How does your firm plan to increase profits over 2016?
- Most important: --Click here--
- Second: --Click here--
- Third: --Click here--

18) Which wealth segment do you feel offers the most growth for your firm?
- --Click Here--

19) Which three regions from the list below will your firm be investing in over 2016?
- Most important: --Click here--
- Second: --Click here--
- Third: --Click here--

20) Which three areas from the list below will your firm be investing in over 2016?
- Most important: --Click here--
- Second: --Click here--
- Third: --Click here--

21) In your country, which cities/states will you be expanding into in 2016?
MARKET FEEDBACK SECTION

22) Which investment products do you see as having the most appetite from clients in 2016?
- [ ] Equity products
- [ ] Fixed income products
- [ ] Structured products
- [ ] Real estate
- [ ] Commodities
- [ ] Private equity/hedge funds
- [ ] Social impact /SRI investments
- [ ] if other (please specify)

23) Which area is more important for your firm to innovate?
- [ ] Front office/client user experience
- [ ] Middle office – Advisor tools and data
- [ ] Back office - systems/client data aggregation

24) In order of importance, which of the following digital strategies is your firm employing?

Most important: --Click here--
Second: --Click here--
Third: --Click here--

25) What do you think is the biggest challenge for the industry globally in 2016?
--Click Here--
if other (please specify)

26) Please select the Best Global Private Bank CEO (excluding your own):
--Click Here--
if other (please specify)

To help us segment the responses to the questions above please indicate the size of your firm's private client Assets Under Management. If applicable please provide both Global and Country level figures.

27) Private Client AUM (Country):
--Click Here--

28) Private Client AUM (Global):
--Click Here--
To submit your responses please click the "Submit" button below. If you would like to review or change your responses before submitting, please click the "Back" button. You will also be able to make changes after submitting the survey by visiting the survey link on the same computer at any time prior to the deadline (provided your browser's cookies have not been cleared).

If you are a survey response coordinator and wish to submit an additional survey from the same computer you will need to delete your internet browser's cookies (found under the tools menu, internet options), close all your browser windows, re-open your browser and return to the survey link. Please note that once you've deleted your cookies you won't be able to make any changes to the previous survey.

Please forward the survey link [www.euromoney.com/PB2016](http://www.euromoney.com/PB2016) to any colleagues who can provide opinions in other countries.