



EUROMONEY PRIVATE BANKING AWARDS

Category Definitions and Evaluation Criteria

2027

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Who Can Participate

- Private banks, non-bank wealth managers, external/independent asset managers, multi-family offices, wealthtech providers
- Investment managers/asset managers
- Life insurance product manufacturers, life insurance brokers
- Technology providers, systems integrators, technology consultants

Timeline

- **Period under determination:** 1 July 2025 to 30 June 2026
- **Submissions open:** 7 September 2026
- **Submission deadline:** 16 October 2026
- **Research interviews:** September-December 2026
- **Winners notified:** January 2027
- **Results and analysis published:** March 2027
- **London awards ceremony:** March 2027
- **Singapore awards ceremony:** April 2027

How to Participate

All entries should be made through our designated submission portal, linked below.

Private Banking Awards Portal

If you are making a submission for the Private Banking Awards for the first time, you will be asked to create an account. If you made a submission in previous years, you will be able to use the same log-in details.

You can build your entries over the submission window and amend them before submitting by logging into your account.

Entry forms can be accessed through the portal after selecting relevant categories from menus.

List of Categories

These awards are offered globally, regionally and at a country/territory level. Regional awards cover the following regions: Africa, Asia, CEE, Europe, Latin America, North America, Middle East, The Nordics and Baltics

Private Banks and Wealth Managers: Market Awards

1. **Best Private Bank**
2. **Best International Private Bank (Regional & country/territory only)**
3. **Best Pure-play / Boutique Private Bank**
4. **Best Independent Wealth Manager**
5. **Private Banker of the Year (Global only)**
6. **Safest Private Bank (Global and regional only)**
7. **Best for Premier Banking**
8. **Best Wealth Tech Provider**

Private Banks and Wealth Managers: Service Awards

9. **Best for Ultra-high-net-worth**
10. **Best for High-net-worth**
11. **Best for Family Office Services**
12. **Best for Next-Gen**
13. **Best for Succession Planning**
14. **Best for Digital Solutions**
15. **Best Chief Investment Office**
16. **Best for Client Service**

Private Banks and Wealth Managers: Product Awards

17. **Best for Sustainability**
18. **Best for Discretionary Portfolio Management**
19. **Best for Alternative Investments**
20. **Best for Funds**
21. **Best for Digital Assets**
22. **Best for Impact Investing**
23. **Best for Equities**
24. **Best for Fixed Income**
25. **Best for FX**
26. **Best for Structured Products**
27. **Best for Real Estate Financing**

Investment Managers

- 28. Best Investment Manager**
- 29. Best Investment Manager for Private Equity**
- 30. Best Investment Manager for Private Credit**
- 31. Best Investment Manager for Public Equities**
- 32. Best Investment Manager for Fixed Income**
- 33. Best Investment Manager for Multi-Asset**

Insurers/Insurance Brokers

- 34. Best Insurance Provider for Wealth Management (Global and regional only)**
- 35. Best Insurance Broker for Wealth Management (Global and regional only)**

Technology Providers

- 36. Best Technology Provider for Wealth Management**

Category definitions and evaluation criteria

Private Banks and Wealth Managers: Market Awards

1. Best Private Bank

This accolade honours private banks that have achieved outstanding business results through superior client service, innovative product offerings, and strategic vision while maintaining the highest standards of fiduciary responsibility. The winner will have excelled in delivering comprehensive wealth solutions, from traditional portfolio management and advisory, to cutting-edge digital platforms and alternative investments. Open to private banks only.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)

Assessment criteria:

- **Market position** (Evidence of increase in wallet share among target clientele)
- **Strategy & execution** (Successful execution of market strategy as set out by leadership)
- **Products** (Successful launches of relevant and market-leading investment products and services)
- **Talent** (Evidence of attracting and maintaining key front-office talent)
- **Digital** (Evidence of market-leading and relevant digital solutions for clients)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

2. Best International Private Bank

This accolade honours private banks - headquartered outside of the region or country/territory for which they are submitting - that have achieved outstanding business results through superior client service, innovative product offerings, and strategic vision while maintaining the highest standards of fiduciary responsibility. The winner will have excelled in delivering comprehensive wealth solutions, from traditional portfolio management and advisory, to cutting-edge digital platforms and alternative investments. Open to private banks only.

Geographic levels awarded at: regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)

Assessment criteria:

- **Market position** (Evidence of increase in wallet share among target clientele)

- **Strategy & execution** (Successful execution of market strategy as set out by leadership)
- **Products** (Successful launches of relevant and market-leading investment products and services)
- **Talent** (Evidence of attracting and maintaining key front-office talent)
- **Digital** (Evidence of market-leading and relevant digital solutions for clients)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

3. Best Pure-play / Boutique Private Bank

This accolade honours banks – that are principally engaged in private banking / wealth management activities - that have achieved outstanding business results through superior client service, innovative product offerings, and strategic vision while maintaining the highest standards of fiduciary responsibility. The winner will have excelled in delivering comprehensive wealth solutions, from traditional portfolio management and advisory, to cutting-edge digital platforms and alternative investments. Open to private banks only.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)

Assessment criteria:

- **Market position** (Evidence of increase in wallet share among target clientele)
- **Strategy & execution** (Successful execution of market strategy as set out by leadership)
- **Products** (Successful launches of relevant and market-leading investment products and services)
- **Talent** (Evidence of attracting and maintaining key front-office talent)
- **Digital** (Evidence of market-leading and relevant digital solutions for clients)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

4. Best Independent Wealth Manager

This accolade honours non-bank wealth managers – such as multi-family offices and/or external/independent asset managers - that have achieved outstanding business results through superior client service, innovative product offerings, and strategic vision while maintaining the highest standards of fiduciary responsibility. The winner will have excelled in delivering comprehensive wealth solutions, from traditional portfolio management and advisory, to cutting-edge digital platforms and alternative investments. Open to non-bank wealth managers only.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)

- RM headcount, YoY growth (%)
- Client count, YoY growth (%)

Assessment criteria:

- **Market position** (Evidence of increase in wallet share among target clientele)
- **Strategy & execution** (Successful execution of market strategy as set out by leadership)
- **Products** (Successful launches of relevant and market-leading investment products and services)
- **Talent** (Evidence of attracting and maintaining key front-office talent)
- **Digital** (Evidence of market-leading and relevant digital solutions for clients)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

5. Private Banker of the Year

The accolade recognises a senior executive who has demonstrated outstanding strategic vision, client relationship excellence and industry influence. The winner exemplifies the highest standard of private banking leadership through their approach to innovation, team development, and measurable business impact through their strategy and advice.

Geographic levels awarded at: global

Assessment criteria:

- **Strategy & execution** (Evidence of strategy and execution that has profoundly benefited the individual's business)
- **Innovation** (Evidence of leadership in sustainability, ESG and technological innovation)
- **Leadership** (Evidence of profound positive impact on the broader private banking and wealth industry)

6. Safest Private Bank

The winning private bank will have showcased a holistic approach to safety that combines regulatory compliance excellence, operational resilience and innovative risk mitigation strategies to provide its clients with the highest levels of asset protection and peace of mind. Open to private banks only.

Geographic levels awarded at: global and regional

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)

Assessment criteria:

- Evidence of capital strength
- Evidence of commitment to client protection (suitability assessments and investment recommendation frameworks)
- Evidence of know-your-customer (KYC) and anti-money laundering (AML) excellence
- Evidence of robust operational resilience and business continuity planning
- Evidence of strong reputational risk management and compliance

7. Best for Premier Banking

The winning banks will have showcased for the review period innovative investment and wealth management product offerings, sophisticated digital delivery models, and a scalable operational model that nurtures client relationships from premier banking/mass affluent through to U/HNW status. Open to private banks only.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)

Assessment criteria:

- **Track record** (Evidence of substantial client progression from premier to private banking segments)
- **Market position** (Evidence of rising wallet share in mass affluent/premier banking segment)
- **Products** (Evidence of innovation across investments, lending and advisory solutions for mass affluent clients)
- **Digital** (Evidence of sophisticated, digitally-enabled service delivery for mass affluent clients)
- **Talent** (Evidence of sophistication of premier banking RMs in terms of services and products)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

8. Best Wealth Tech Provider

This award recognises a wealth management provider, robo-advisor, brokerage, and/or licensed deposit-taking institution that has excelled in providing digital-first, cost-effective wealth management services for U/HNW and/or mass affluent clients. The winning institution(s) will have distinguished themselves through digitally-led capabilities including trading/brokerage, advisory, discretionary portfolios, portfolio management tools, combined with transparent and competitive fee structures, that bridge the gap between traditional private banking and digital convenience.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)

Assessment criteria:

- **Market position** (Evidence of rising wallet share and fund raising from U/HNW and mass affluent clients)
- **Products** (Evidence and examples of comprehensive product offering across traditional and alternative assets)

- **Digital** (Evidence of sophisticated and technology-driven portfolio management and asset allocation tools)
- **Client service** (Evidence of competitive and transparent fee structure)
- **Risk management** (Evidence of comprehensive and robust risk management and client suitability processes)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

Private Banks and Wealth Managers: Service Awards

9. Best for Ultra-high-net-worth

This accolade honours banks and/or wealth managers that have achieved outstanding business results through superior client service, innovative product offerings, and strategic vision for ultra-high-net-worth clients while maintaining the highest standards of fiduciary responsibility. The winner will have excelled in delivering comprehensive wealth solutions, from traditional portfolio management and advisory, to cutting-edge digital platforms and alternative investments.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)

Assessment criteria:

- **Market position** (Evidence of rising wallet share in UHNW client segment)
- **Products** (Evidence of sophisticated product offering across traditional and alternative assets, and multi-jurisdictional wealth planning)
- **Talent** (Evidence and examples of high-touch, experienced UHNW RM teams)
- **Digital** (Evidence of sophisticated digital delivery models for UHNW clientele)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

10. Best for High-net-worth

This accolade honours banks and/or wealth managers that have achieved outstanding business results through superior client service, innovative product offerings, and strategic vision for high-net-worth clients while maintaining the highest standards of fiduciary responsibility. Winners will have excelled in delivering comprehensive wealth solutions, from traditional portfolio management and advisory, to cutting-edge digital platforms and alternative investments.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)

- Client count, YoY growth (%)

Assessment criteria:

- **Market position** (Evidence of rising wallet share in HNW client segment)
- **Products** (Evidence of sophisticated product offering across traditional and alternative assets, and multi-jurisdictional wealth planning)
- **Talent** (Evidence and examples of high-touch, experienced HNW RM teams)
- **Digital** (Evidence of sophisticated digital delivery models for HNW clientele)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

11. Best for Family Office Services

This accolade honours banks and/or wealth managers that have achieved outstanding business results through superior client service, innovative product offerings for single family offices and/or external/independent asset managers or other intermediaries, and strategic vision while maintaining the highest standards of fiduciary responsibility. Winners will have excelled in co-ordinating complex family structures, governance frameworks, tax optimisation, and other crucial services that have helped to preserve and grow legacy wealth.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)

Assessment criteria:

- **Market position** (Evidence of rising wallet share in family office and/or intermediary client segment)
- **Products** (Evidence of sophisticated product offering across traditional and alternative assets, and multi-jurisdictional wealth planning)
- **Talent** (Evidence and examples of high-touch, experienced family office and/or intermediary teams)
- **Digital** (Evidence of sophisticated digital delivery models for family office clientele)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

12. Best for Next-Gen

This accolade honours banks and/or wealth managers that have demonstrated they are an exemplary provider of services and engagement for younger family members. Winner(s) should be able to demonstrate tangible evidence of helping to develop meaningful connections between next-generation clientele and their family wealth, as well as excellence in creating tailored programmes that bridge generational gaps.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)

- RM headcount, YoY growth (%)
- Client count, YoY growth (%)

Assessment criteria:

- **Market position** (Evidence of increasing wallet share among next generation clientele)
- **Client service** (Examples of sophisticated, effective educational/content programmes for next-gen clients)
- **Digital** (Evidence of sophisticated digital delivery models that appeal to next-gen clients)
- **Products** (Evidence of product/solutions that appeal to next-gen clients (e.g. ESG and impact investing))
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

13. Best for Succession Planning

This accolade honours banks and/or wealth managers that have demonstrated expertise in complex estate planning, trust structures, family governance and tax efficiency, while also providing education and support for multi-generational wealth preservation. Winner(s) will have been able to showcase their ability to co-ordinate multi-disciplinary teams, navigate multiple jurisdictions and implement sophisticated wealth structures.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)

Assessment criteria:

- **Track record** (Examples of success in executing complex family wealth transfers)
- **Market positioning** (Evidence of how succession planning has led to higher wallet share)
- **Products** (Evidence of sophisticated offering across tax planning, trust, and family governance, in co-ordination with third-party service providers)
- **Talent** (Evidence of dedicated and experienced wealth and succession planning personnel)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

14. Best for Digital Solutions

This award recognises private banks and/or wealth managers that have demonstrated operational excellence in digital transformation across all touchpoints of the client journey. The winner(s) will have implemented comprehensive digital capabilities that enhance client experience while maintaining personalised services. Successful applicants will have shown leadership in AI adoption, mobile-first platforms, seamless digital onboarding, secure client collaboration tools and robust cybersecurity measures.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)

- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)
- Digital platform adoption rate (% of clients)

Assessment criteria:

- **Digital** (Evidence of superior mobile and digital platform experience for clients, including advanced, secure digital communications and collaboration)
- **Innovation** (Evidence of seamless integration of artificial intelligence to support RMs and clients)
- **Security** (Evidence of comprehensive and seamless cybersecurity and threat detection architecture)
- **Risk management** (Evidence of enhanced digital onboarding and know-your-customer (KYC) processes)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

15. Best Chief Investment Office

This award recognises private banks and/or wealth managers whose Chief Investment Office (CIO) function has demonstrated excellence in thought leadership, strategic asset allocation, investment governance, research capabilities and communication with clients and relationship managers.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)
- Outperformance of flagship Strategic Asset Allocation versus benchmark (bps)

Assessment criteria:

- **Risk management** (Evidence of strong investment governance relating to asset allocation and investment decisions)
- **Client service** (Evidence of market-leading thought leadership and research, and effective communication of it with clients and RMs)
- **Track record** (Evidence of risk-adjusted investment outperformance resulting from Tactical Asset Allocation, and successful strategic asset-allocation decisions)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

16. Best for Client Service

This accolade honours private banks and/or wealth managers that have demonstrated excellence during the period under review in terms of delivering comprehensive client service through personalised relationship management, innovative digital solutions, premium concierge services and exclusive lifestyle benefits.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)

Assessment criteria:

- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)
- **Market position** (Evidence of how client satisfaction is leading to increased wallet share)
- **Client service** (Examples of comprehensive concierge and lifestyle services)
- **Digital** (Evidence of sophisticated digital delivery channels)
- **Track record** (Examples and evidence of faster on-boarding and client response times)

17. Best for Sustainability

This accolade honours a private bank and/or wealth manager that has excelled in comprehensively integrating ESG principles across its investment frameworks, client advisory processes, and overall business strategy. The winning institution(s) should demonstrate a clear commitment to sustainable finance through product innovation, stewardship, reporting transparency and measurable sustainability outcomes for clients.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)
- Sustainable or ESG-integrated AUM as share of client total (%)

Assessment criteria:

- **Strategy & execution** (Evidence of comprehensive ESG integration)
- **Products** (Evidence of sustainable product innovation)
- **Track record** (Evidence of measurable sustainability outcomes, as well as stewardship and engagement activities)
- **Risk management** (Evidence of internal sustainability leadership and governance)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

Private Banks and Wealth Managers: Product Awards

18. Best for Discretionary Portfolio Management

This accolade honours private banks and/or wealth managers that have excelled in providing active investment management services on behalf of their clientele during the review period, through outstanding portfolio construction, risk management, and overall performance. The winner(s) will be able to demonstrate superior investment acumen, robust governance, and sophisticated asset allocation strategies for its clients with a track record for delivering above market returns on a risk-adjusted basis.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)
- Penetration of rate of DPM products as a share of total client AUM (%)

Assessment criteria:

- **Track record** (Evidence of superior investment returns on a risk-adjusted basis for discretionary mandates)
- **Market position** (Evidence of successful fund-raising across discretionary mandates)
- **Products** (Evidence of innovative product launches and customisation across asset classes)
- **Risk management** (Evidence of sophisticated risk management frameworks and monitoring)
- **Strategy & execution** (Evidence of integration of ESG and sustainability processes)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

19. Best for Alternative Investments

This accolade honours private banks and/or wealth managers that have provided clients with exceptional access and expertise in alternative asset classes including private equity, private credit, hedge funds, real estate and infrastructure. Winner(s) will be able to demonstrate superior due diligence capabilities, strong asset management relationships, innovative product structuring, and comprehensive risk management while delivering investment opportunities that boost portfolio diversification and returns.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)
- Funds raised from clients for alternative investment products (US\$)

Assessment criteria:

- **Market position** (Evidence of rising wallet share and fundraising across alternative investments)
- **Track record** (Evidence of superior risk-adjusted performance across alternative investments)
- **Products** (Evidence of innovative product launches and customisation across alternatives)
- **Risk management** (Evidence of sophisticated risk management frameworks and monitoring)
- **Strategy & execution** (Evidence of integration of ESG and sustainability processes)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

20. Best for Funds

This accolade honours private banks and/or wealth managers that have demonstrated excellence in distributing and advising on open-ended fund products across fixed income, equity, multi-asset, money markets, ETFs, and other traditional asset classes. Winner(s) will have distinguished themselves through comprehensive fund platform capabilities, rigorous fund selection, and their ability to deliver optimal performance to clients on a risk-adjusted basis.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)
- Funds raised from clients across traditional fund products (US\$)

Assessment criteria:

- **Market position** (Evidence of rising wallet share and fundraising across traditional investment products)
- **Track record** (Evidence of superior risk-adjusted performance across traditional investment products)
- **Products** (Evidence of innovative product launches and customisation across traditional investment products)
- **Risk management** (Evidence of sophisticated risk management frameworks and monitoring)
- **Strategy & execution** (Evidence of integration of ESG and sustainability processes)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

21. Best for Digital Assets

This accolade honours private banks and/or wealth managers that have successfully integrated cryptocurrency and digital asset capabilities across execution, advisory, custody and/or trust solutions while maintaining the highest levels of risk management, cybersecurity and regulatory compliance.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money

- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)
- Client digital assets under management/custody (US\$)

Assessment criteria:

- **Market position** (Evidence of rising client exposure to digital assets in terms of advice, execution and custody)
- **Products** (Evidence and examples of successful digital asset-related product launches)
- **Risk management** (Evidence of comprehensive and robust risk management processes around digital assets)
- **Digital** (Evidence of sophisticated digital delivery channels related to digital assets)
- **Client service** (Evidence of sophisticated educational content on digital assets for clients and RMs)

22. Best for Impact Investing

This award recognises private banks and/or wealth managers that have demonstrated excellence in delivering impact investment solutions that generate measurable social and environmental benefits alongside financial returns. The winner(s) will be able to demonstrate strong impact measurement frameworks and evidence of client adoption.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)
- Client assets under management deployed into impact solutions (US\$)

Assessment criteria:

- **Track record** (Evidence of measurable client impact outcomes)
- **Market position** (Evidence of successful fundraising into impact solutions)
- **Products** (Evidence of innovative impact-investment offerings)
- **Risk management** (Evidence of sophisticated impact measurement frameworks)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

23. Best for Equities

This award recognises private banks and/or wealth managers that have demonstrated excellence in delivering equity investment solutions, research capability, portfolio construction, and client outcomes. The winning institution should show strength across both advisory and discretionary equity strategies.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)

- RM headcount, YoY growth (%)
- Client count, YoY growth (%)
- Notional traded volume in equities (US\$)

Assessment criteria:

- **Track record** (Evidence of superior equity investment performance)
- **Products** (Evidence of innovative equity solutions and structuring, and strength in equity research and idea generation)
- **Risk management** (Evidence of portfolio diversification and risk management)
- **Market position** (Evidence of client adoption and wallet-share growth)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

24. Best for Fixed Income

This award recognises private banks and/or wealth managers that have excelled in fixed-income portfolio construction, bond selection, credit analysis and fixed-income advisory solutions. The winning institution(s) should demonstrate superior client outcomes and strong fixed-income expertise.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)
- Notional traded volume in fixed income (US\$)

Assessment criteria:

- **Track record** (Evidence of superior fixed income investment performance)
- **Products** (Evidence of innovative fixed income solutions and structuring, and strength in fixed income research and idea generation)
- **Risk management** (Evidence of portfolio diversification and risk management)
- **Market position** (Evidence of client adoption and wallet-share growth)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

25. Best for FX

This award recognises private banks and/or wealth managers that have demonstrated excellence in foreign exchange execution, advisory services, hedging strategies and multi-currency solutions for private banking clients. The winner(s) should demonstrate strong expertise in helping clients manage currency risks and opportunities.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)

- Notional traded volume in FX (US\$)

Assessment criteria:

- **Track record** (Evidence of strong execution quality and pricing)
- **Products** (Evidence of innovative FX products and hedging solutions)
- **Risk management** (Evidence of helping clients manage currency risk)
- **Market position** (Evidence of client engagement and adoption of FX services)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

26. Best for Structured Products

This award recognises private banks and/or wealth managers that have demonstrated excellence in designing, distributing and advising on structured products for clients. The winning institution(s) should show innovation, risk management, suitability assessments and strong client outcomes.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)
- Notional traded volume in structured products (US\$)

Assessment criteria:

- **Products** (Evidence of innovative structured-product design)
- **Risk management** (Evidence of strong suitability, and governance processes and risk management processes)
- **Track record** (Evidence of superior client outcomes)
- **Market position** (Evidence of wallet-share growth and client adoption)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

27. Best for Real Estate Financing

This award recognises private banks and/or wealth managers that have demonstrated excellence in delivering real estate financing solutions for clients. Successful entrants should demonstrate expertise across residential, commercial and specialist real estate lending, while maintaining prudent risk management standards and providing tailored financing structures.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Assets under management, YoY growth (%)
- Net new assets / net new money
- Revenue, YoY growth (%)
- Cost to income ratio, YoY change (percentage points)
- RM headcount, YoY growth (%)
- Client count, YoY growth (%)
- Value of outstanding real estate loans (US\$)

Assessment criteria:

- **Products** (Evidence of innovative financing structures, and expertise across multiple real estate sectors)
- **Risk management** (Evidence of sophisticated credit and risk management)
- **Track record** (Evidence of strong client outcomes)
- **Market position** (Evidence of growth in real estate financing business)
- **Client feedback** (Evidence of positive and improving feedback on products and services from clientele*)

Investment Managers

28. Best Investment Manager

This award recognises third-party investment managers or other providers of investment products that have excelled in all facets of manufacturing and distributing investment solutions through private banking and wealth management channels. The winner(s) will have built extensive distribution networks among private banks and wealth managers, raised significant capital from U/HNW and mass affluent clients, delivered risk-adjusted outperformance across two or more asset classes, and demonstrated market-leading knowledge and expertise of wealth channels.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Number of private bank/wealth management distribution agreements in place
- Funds raised via wealth channels across all investment products (US\$)

Assessment criteria:

- **Market position** (Evidence of rising wallet share among private banks and wealth managers)
- **Track record** (Evidence of risk-adjusted outperformance of funds)
- **Client service** (Evidence of thought leadership and engagement with U/HNWI demographic)
- **Talent** (Evidence of investment in resources and infrastructure associated with wealth channel)
- **Products** (Evidence of innovation when it comes to fund structures, liquidity and fees)

29. Best Investment Manager for Private Equity

This award recognises third-party investment managers or other providers of private equity-focused investment products that have excelled in the manufacturing and distribution of these investment solutions through private banking and wealth management channels. The winner(s) will have built extensive distribution networks among private banks and wealth managers, raised significant capital from U/HNW and mass affluent clients, delivered risk-adjusted outperformance across the private equity asset class, and demonstrated market-leading knowledge and expertise of wealth channels.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Number of private bank/wealth management distribution agreements in place
- Funds raised via wealth channels across private equity products (US\$)

Assessment criteria:

- **Market position** (Evidence of rising wallet share among private banks and wealth managers)
- **Track record** (Evidence of risk-adjusted outperformance of funds)

- **Client service** (Evidence of thought leadership and engagement with U/HNWI demographic)
- **Talent** (Evidence of investment in resources and infrastructure associated with wealth channel)
- **Products** (Evidence of innovation when it comes to fund structures, liquidity and fees)

30. Best Investment Manager for Private Credit

This award recognises third-party investment managers or other providers of private credit-focused investment products that have excelled in the manufacturing and distribution of these investment solutions through private banking and wealth management channels. The winner(s) will have built extensive distribution networks among private banks and wealth managers, raised significant capital from U/HNW and mass affluent clients, delivered risk-adjusted outperformance across the private credit asset class, and demonstrated market-leading knowledge and expertise of wealth channels.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Number of private bank/wealth management distribution agreements in place
- Funds raised via wealth channels across private credit products (US\$)

Assessment criteria:

- **Market position** (Evidence of rising wallet share among private banks and wealth managers)
- **Track record** (Evidence of risk-adjusted outperformance of funds)
- **Client service** (Evidence of thought leadership and engagement with U/HNWI demographic)
- **Talent** (Evidence of investment in resources and infrastructure associated with wealth channel)
- **Products** (Evidence of innovation when it comes to fund structures, liquidity and fees)

31. Best Investment Manager for Public Equities

This award recognises third-party investment managers or other providers of public equity-focused investment products – such as mutual funds or ETFs - that have excelled in the manufacturing and distribution of these investment solutions through private banking and wealth management channels. The winner(s) will have built extensive distribution networks among private banks and wealth managers, raised significant capital from U/HNW and mass affluent clients, delivered risk-adjusted outperformance across the public equity asset class, and demonstrated market-leading knowledge and expertise of wealth channels.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Number of private bank/wealth management distribution agreements in place
- Funds raised via wealth channels across public equity products (US\$)

Assessment criteria:

- **Market position** (Evidence of rising wallet share among private banks and wealth managers)
- **Track record** (Evidence of risk-adjusted outperformance of funds)
- **Client service** (Evidence of thought leadership and engagement with U/HNWI demographic)
- **Talent** (Evidence of investment in resources and infrastructure associated with wealth channel)
- **Products** (Evidence of innovation when it comes to fund structures, liquidity and fees)

32. Best Investment Manager for Fixed Income

This award recognises third-party investment managers or other providers of fixed income- and public credit-focused investment products that have excelled in the manufacturing and distribution of these investment solutions through private banking and wealth management channels. The winner(s) will have built extensive distribution networks among private banks and wealth managers, raised significant capital from U/HNW and mass affluent clients, delivered risk-adjusted outperformance across the fixed income asset class, and demonstrated market-leading knowledge and expertise of wealth channels.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Number of private bank/wealth management distribution agreements in place
- Funds raised via wealth channels across fixed income products (US\$)

Assessment criteria:

- **Market position** (Evidence of rising wallet share among private banks and wealth managers)
- **Track record** (Evidence of risk-adjusted outperformance of funds)
- **Client service** (Evidence of thought leadership and engagement with U/HNWI demographic)
- **Talent** (Evidence of investment in resources and infrastructure associated with wealth channel)
- **Products** (Evidence of innovation when it comes to fund structures, liquidity and fees)

33. Best Investment Manager for Multi-Asset

This award recognises third-party investment managers or other providers of multi-asset-focused investment products that have excelled in the manufacturing and distribution of these investment solutions through private banking and wealth management channels. The winner(s) will have built extensive distribution networks among private banks and wealth managers, raised significant capital from U/HNW and mass affluent clients, delivered risk-adjusted outperformance across funds that invest in more than one asset class – such as equities, fixed income, derivatives, and/or alternatives - and demonstrated market-leading knowledge and expertise of wealth channels.

Geographic levels awarded at: global, regional and country/territory

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Number of private bank/wealth management distribution agreements in place
- Funds raised via wealth channels across multi-asset products (US\$)

Assessment criteria:

- **Market position** (Evidence of rising wallet share among private banks and wealth managers)
- **Track record** (Evidence of risk-adjusted outperformance of funds)
- **Client service** (Evidence of thought leadership and engagement with U/HNWI demographic)
- **Talent** (Evidence of investment in resources and infrastructure associated with wealth channel)
- **Products** (Evidence of innovation when it comes to fund structures, liquidity and fees)

Insurers/Insurance Brokers

34. Best Insurance Provider for Wealth Management

This award honours life insurance product manufacturers that have demonstrated excellence in distributing insurance-based wealth planning solutions through the private wealth channel to U/HNW and/or mass affluent clients. The winner(s) will have distinguished itself through innovative product development tailored for wealth planning needs, strong distribution partnerships with the wealth channel, and expertise and support in devising complex structures.

Geographic levels awarded at: global, regional

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Value of new insurance premiums generated through private banking and wealth channels (US\$)

Assessment criteria:

- **Market position** (Evidence of rising penetration among private banks and wealth managers)
- **Products** (Evidence of product innovation, and wealth planning integration, specialised underwriting capabilities and bespoke policy structuring)
- **Client feedback** (Evidence of client satisfaction and retention)
- **Strategy & execution** (Evidence of rising average premium per policy)
- **Track record** (Evidence of specialised underwriting capabilities and bespoke policy structuring)

35. Best Insurance Broker for Wealth Management

This award honours insurance brokers that have demonstrated excellence in delivering insurance-based wealth planning solutions through the private wealth channel to U/HNW and mass affluent clients. The winner(s) will have distinguished themselves through exceptional advisory and structuring expertise, strong partnerships with private banks, wealth managers and insurance product manufacturers, and an ability to design and implement complex insurance solutions that meet sophisticated client wealth planning, succession planning, asset protection and cross-border estate planning needs.

Geographic levels awarded at: global, regional

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Value of new insurance premiums facilitated through private banking and wealth channels (US\$)

Assessment criteria:

- **Market position** (Evidence of rising penetration among private banks, wealth managers and family offices)
- **Track record** (Evidence of excellence in complex wealth-planning and insurance-structuring solutions)
- **Talent** (Evidence of adviser education, technical support and relationship manager enablement)
- **Products** (Evidence of innovative solutions for UHNW and cross-border client needs, specialised underwriting capabilities, and insurer access and bespoke policy structuring)

Technology Providers

36. Best Technology Provider for Wealth Management

This award honours technology vendors, systems integrators or technology consultants that have set a new standard in excellence for delivering solutions to the private banking and wealth management industries. Winner(s) will have a clear track record of developing and maintaining strong client relationships in the private wealth space, and demonstrable evidence of how their platform(s) help private banks and/or wealth managers to reach their operational objectives. This category will accept nominations from applicants across the private banking technology eco-system.

Geographic levels awarded at: global, regional

Metrics assessed*:

***Time periods required: H2 2025, H1 2026**

- Revenue derived from private banking and wealth management channel (US\$)

Assessment criteria:

- **Market position** (Evidence of rising wallet share among private banks and wealth managers)
- **Track record** (Evidence of how technology has helped private banks reach operational objectives)
- **Products** (Evidence of comprehensive technological capabilities across wealth spectrum)
- **Risk management** (Evidence of robust business continuity and cyber security measures)
- **Digital** (Evidence of being at the cutting edge of innovation when it comes to technology deployments in private banking)



All queries related to participation, please contact [Alex Pang](#)
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