



## Euromoney Private Banking Awards 2023 – Entry Guidelines

For 20 years, Euromoney has been recognising the best in private banking and wealth management across the globe through the Private Banking and Wealth Management Survey.

To keep our products evolving and fresh, in 2023 we are building off this experience and inviting the world's leading private banking and wealth management institutions to showcase their achievements in client service, product development and commitment to the sector in the last 12 months through direct written entries. This direct entry process will replace the survey.

Your entry is your chance to tell us about your institution's achievements during the review period and to explain why your institution should win.

**Country awards** will be decided by an in-house panel. Entries for our **regional** and **global private banking awards** will be assessed by an external judging panel, consisting of some of the market's most senior and seasoned private banking experts.

The awards will accept entries from private banks and wealth managers based anywhere in the world and will recognise institutions in all categories and geographies where there is sufficient evidence. The award categories will vary by market, depending on the level of activity, the depth of the market and the quality of entries. There is no fee or cost to participate.

### Key dates

- Entries open: October 4, 2022
- Entries close: November 18, 2022
- Winners notified: no later than February 3, 2023
- Private Banking Awards ceremony: March, 2023

All entry forms must be completed [HERE](#) by **November 18, 2022**

### Research methodology

#### 1. Your entry

- The entry process is your opportunity to explain and evidence your institution's performance in the category in question. All entries should answer the questions outlined below, but you should tailor your response to the category and geography.
- Each institution must submit a written entry for the award via the dedicated awards portal. **Please note:** all work being submitted must have taken place during between October 2021 and September 2022.
- Institutions are also invited to share relevant data to illustrate their growth and financial performance over the review period. You may provide an appendix detailing the most recent publicly available data to cover the review period from October 2021 to September 2022. All data sources must be clearly referenced and dated, and can include the following: Total number of customers; Net new customers; Total AUM in USD\$; Net new AUM in USD\$; Cost to Income ratio; Net Profits
- Entries should only include information that we can use to justify the granting of an award. Nothing can be considered confidential if it is used in an award entry.

## 2. Judging

- You will be able to amend your entry once it has been submitted up until the November 18 deadline, but entries cannot be modified after this date.
- The Euromoney team will review all entries over December and January, including conducting further research into the market.

We will convene our panel of industry experts to decide on winners for regional and global awards in January.

All entries must be made via our [online portal](#)

If you have any questions, please contact [Alex Pang](#)

## Award Categories

There are awards at a Global, Regional and Country level across all the categories below. Qualifying criteria at each level will differ.

### Global awards

- Eligible institutions must have an onshore branch presence in a minimum of three regions: Europe, Asia, Middle East, Africa, North America, Latin America

### Regional awards

- Regional awards will cover: Europe, Africa, Middle East, Latin America, North America
- Eligible institutions must have a branch in the region

### Country awards

- Eligible institutions will have an onshore branch presence in the country
- Country-level coverage will be dependent on the quality of entries
- We will be awarding both a Domestic and International Best Private Bank winner in each country where we have sufficient evidence to do so
- Domestic winners will be headquartered in a particular country, while international winners will be headquartered in outside of the country

## Categories

- World's Best Private Bank / Region's Best Private Bank / Country's Best Private Bank
- Best for Investment Research
- Best for Family Offices Services
- Best for Digital
- Best for ESG Investing
- Best for Wealth Transfer/Succession Planning
- Best for Discretionary Portfolio Management
- Best for High Net Worth Individuals
- Best for Ultra High Net Worth Individuals

## Entry questions

**Important reminder:** all categories ask for information covering the same four areas, but you must tailor your responses to the category you are entering – **Entries must be fulfilled in English.**

### 1. Products and propositions (250 words)

Tell us about any notable changes or improvements to your client offering during the review period which you feel have given you a market advantage in this category. This might include the development of fresh investment strategies, or new innovations in product or proposition. The awards will recognise competitive first movers, impact on clients and/or the market and commercial success.

**2. Innovation and technology (250 words)**

Tell us about any upgrades or investments that you have made to your technology during the review period, which you feel have given you a competitive advantage in this area.

**3. Client service and delivery (250 words)**

Please tell us about your institution's recent commitments to delivering excellent client service. This might include supporting clients in unusual or demanding circumstances, going above and beyond in serving clients, or changes to the delivery of client guidance in relation to the category. The awards will consider how this differentiates your services from the competition.

**4. Why should you be recognised as the leading Private Bank or Wealth Manager in this category? (500 words)**

This is your opportunity to tell us, in your own words, how you stand out from the competition in this category, and how your institution has differentiated itself over the review period. You can highlight specific achievements from your responses to previous questions where relevant.

While the above questions form the main part of your award entry, you will also have the opportunity to upload further information – including financial data – to supplement your responses if you wish.

All entries must be made via our [online portal](#) by **18 November**

If you have any questions regarding the awards, please contact [Alex Pang](#)

For any commercial enquiries, please contact [Peter York](#)