



Euromoney Private Banking Awards 2025

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Introduction

Who Can Enter

- Private Banks
- Wealth Managers
- Multi-Family Offices
- Technology Providers
- Trust Firms
- Custody Services Providers

Benefits of Participation

- Enhance your business's reputation within the global private banking and wealth industry among clients through independent validation and accreditation
- Gain meaningful feedback into your business from our panel of industry leading experts
- Celebrate your business's achievements in the sector
- Demonstrate to clients the value and commitment your business brings to the industry
- Access marketing logos and other promotional collateral
- Receive coverage on Euromoney.com in the form of award write ups and market trend and benchmarking reports
- Secure an invitation to attend the Euromoney Private Banking Awards ceremony
- There is no fee to participate in the research or connected to winning an award

Research Timeline

- Period Under Determination: 1 October 2023 to 30 September 2024
- Submissions Open: 2 October 2024
- Submission Deadline: 8 November 2024
- Research Interviews: November – December 2024
- Winners Notified: February 2025
- Awards Ceremony: March 2025
- Results and Analysis Published: March 2025

Award Categories

Global Awards

Private Banks, Wealth Managers, and Multi-Family Offices

- World's Best Private Bank
- World's Best Private Banker
- World's Best Pure Play/Boutique Private Bank
- World's Best for Ultra-High-Net Worth (UHNW)
- World's Best for High Net Worth (HNW)
- World's Best for Family Office Services
- World's Best for Succession Planning
- World's Best for Next-Gen
- World's Best for Discretionary Portfolio Management
- World's Best for Alternative Investments ****NEW****
- World's Best for Fund Selection ****NEW****
- World's Best for Digital Solutions
- World's Best for Sustainability
- World's Best for Investment Research
- World's Best Chief Investment Office
- World's Best for Philanthropic Advisory
- World's Best for Art Advisory and Financing ****NEW****
- World's Best for Commercial Real Estate Financing ****NEW****
- World's Best for International China Clients
- World's Best for International Latin American Clients ****NEW****
- World's Best for Non-Resident Indians
- World's Best Employer ****NEW****

Technology Providers

- Best Technology Provider for Wealth Management ****NEW****
- Best Core Banking Solution for Wealth Management ****NEW****
- Best Digital Solution for Wealth Management ****NEW****
- Best Portfolio Management Solution ****NEW****

Custody Services Providers

- Best for Custody Services ****NEW****

Regional Awards

Private Banks, Wealth Managers, and Multi-Family Offices

- Region's Best Private Bank
- Region's Best International Private Bank
- Region's Best Pure Play/Boutique Private Bank
- Region's Best for Ultra-High-Net Worth (UHNW)
- Region's Best for High Net Worth (HNW)
- Region's Best for Family Office Services
- Region's Best for Succession Planning
- Region's Best for Next-Gen
- Region's Best for Discretionary Portfolio Management
- Region's Best for Alternative Investments ****NEW****
- Region's Best for Fund Selection ****NEW****
- Region's Best for Digital Solutions
- Region's Best for Sustainability
- Region's Best for Investment Research
- Region's Best Chief Investment Office
- Region's Best for Philanthropic Advisory

Technology Providers

- Best Technology Provider for Wealth Management ****NEW****

Country/Territory Awards

- Country's/Territory's Best Private Bank
- Country's/Territory's Best International Private Bank
- Country's/Territory's Best Pure Play/Boutique Private Bank ****NEW****
- Country's/Territory's Best Wealth Manager ****NEW****
- Country's/Territory's Best for Ultra-High-Net Worth (UHNW)
- Country's/Territory's Best for High Net Worth (HNW)
- Country's/Territory's Best for Family Office Services
- Country's/Territory's Best for Succession Planning
- Country's/Territory's Best for Next-Gen
- Country's/Territory's Best for Discretionary Portfolio Management
- Country's/Territory's Best for Alternative Investments ****NEW****
- Country's/Territory's Best for Investment Research
- Country's/Territory's Best for Digital Solutions
- Country's/Territory's Best for Sustainability
- Country's/Territory's Best for Philanthropic Advisory

Trust Firms

- Best Trust Administrator ****NEW****

Award Category Criteria

Listed below are the award categories and definitions and the primary assessment criteria used to compare entrants and to decide winners.

Entrants should focus on highlighting how their business has developed over the period under determination (**1 October 2023 – 30 September 2024**) on their submissions.

Strong entries are those that can evidence how and why a business has made an impact on its business, its clients or the market through adding to or enhancing its offering through its strategy, products and services and advice.

Entrants should always aim to validate any improvements their business has made in the period under determination with evidence. Some examples of how to validate improvement include demonstrating improved financial performance, returns or added efficiencies for clients, or increased market share.

Private Banks, Wealth Managers, and Multi-Family Offices

Best Private Bank

The private bank globally, regionally or at a country/territory level within the review period that has most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global, regional and country/territory

Eligible Global Entrants: International private banks operating globally

Eligible Regional Entrants: Regional private banks operating in their home region

Eligible Country/Territory Entrants: Domestically headquartered private banks

Assessment Criteria:

- Financial performance (AUM, credit rating, net new assets, profit before tax (PBT) growth, return on equity (ROE), revenue)
- Market share
- Strategy
- Team structure, composition and tenure
- Lending and deposits
- Products and services
- Digital solutions
- Sustainability
- Philanthropic investments
- Research

Best International Private Bank

The **non-domestically headquartered** private bank that has at a country/territory level within the review period most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Regional and country/territory

Eligible Regional Entrants: International private banks operating outside of their home region

Eligible Country/Territory Entrants: Non-domestically headquartered private banks

Assessment Criteria:

- Financial performance (AUM, credit rating, net new assets, profit before tax (PBT) growth, return on equity (ROE), revenue)
- Market share
- Strategy
- Team structure, composition and tenure
- Lending and deposits
- Products and services
- Digital solutions
- Sustainability
- Philanthropic investments
- Research

Best Private Banker

The private banker within the review period whose leadership has most successfully impacted their business, clients or the private banking and wealth management industry through their strategy and advice.

Geographic Levels Awarded at: Global

Eligible Entrants: Private bankers

Assessment Criteria:

- Strategy and execution
- Transformation
- Impact on the bank or industry

Best Pure Play/Boutique Private Bank

The **pure play or boutique** private bank – banks that are not engaged in activity outside of the private banking and wealth management industry – that has globally, regionally or at a country/territory level within the review period most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global, regional and country/territory

Eligible Entrants: Pure play or boutique private banks

Assessment Criteria:

- Financial performance (AUM, credit rating, net new assets, profit before tax (PBT) growth, return on equity (ROE), revenue)
- Market share
- Strategy
- Team structure, composition and tenure
- Lending and deposits
- Products and services
- Digital solutions
- Sustainability
- Philanthropic investments
- Research

Best Wealth Manager

The domestically headquartered wealth manager that has at a country/territory level within the review period most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Country/territory

Eligible Entrants: Domestically headquartered wealth managers

Assessment Criteria:

- Financial performance (AUM, credit rating, net new assets, profit before tax (PBT) growth, return on equity (ROE), revenue)
- Market share
- Strategy
- Team structure, composition and tenure
- Lending and deposits
- Products and services
- Digital solutions
- Sustainability
- Philanthropic investments
- Research

Best for Ultra-High-Net Worth (UHNW)

The provider within the review period that has globally, regionally or at a country/territory level most successfully impacted its UHNW business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Market share of this segment
- Strategy
- Team structure, composition and tenure
- Products and services
- Digital solutions

Best for High Net Worth (HNW)

The provider within the review period that has globally, regionally or at a country/territory level most successfully impacted its HNW business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Market share of this segment
- Strategy
- Team structure, composition and tenure
- Products and services
- Digital solutions

Best for Family Office Services

The provider of family office services in the review period that has globally, regionally or at a country/territory level most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Multi-family offices, private banks, and wealth managers

Assessment Criteria:

- Financial performance (AUM, credit rating, net new assets, profit before tax (PBT) growth, return on equity (ROE), revenue)
- Market share of this segment

- Strategy
- Team structure, composition and tenure
- Lending and deposits
- Products and services
- Digital solutions

Best for Next-Gen

The provider of next-gen services (offered to younger generations) in the review period that has globally, regionally or at a country/territory level most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Market share of this segment
- Strategy
- Team structure, composition and tenure
- Products and services
- Digital solutions

Best for Succession Planning

The provider of succession planning services in the review period that has globally, regionally or at a country/territory level most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Multi-family offices, private banks, and wealth managers

Assessment Criteria:

- Financial performance (AUM, credit rating, net new assets, profit before tax (PBT) growth, return on equity (ROE), revenue)
- Market share of this segment
- Strategy
- Team structure, composition and tenure
- Products and services
- Digital solutions
- Wealth transition examples

Best for Discretionary Portfolio Management

The provider of Discretionary Portfolio Management (DPM) services in the review period that has globally, regionally or at a country/territory level most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Strategy in this segment
- Team structure, composition and tenure
- Products and services
- Digital solutions
- Investment portfolio performance
- Reporting and transparency of investment performance

Best for Alternative Investments ****NEW****

The provider of alternative investments services in the review period that has globally, regionally or at a country/territory level most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Strategy in this segment
- Team structure, composition and tenure
- Products and services
- Digital solutions
- Investment portfolio performance
- Reporting and transparency of investment performance
- Examples of recent investments

Best for Fund Selection ****NEW****

The provider of fund selection services in the review period that has globally or regionally most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global and regional

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Strategy
- Team structure, composition and tenure
- Products and services
- Digital solutions

- Breadth of investment funds and providers available
- Reporting and transparency of investment performance

Best for Digital Solutions

The private bank or wealth manager in the review period that has globally, regionally or at a country/territory level most successfully impacted its business, its clients or the private banking and wealth management industry through its digital solutions.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Mobile and internet banking
- Wealth and portfolio management tools
- Client communication and collaboration platforms
- Onboarding and customer acquisition data
- Cyber-security
- AI adoption and tools

Best for Sustainability

The provider that has globally, regionally or at a country/territory level most successfully impacted sustainability within the review period through its strategy, offering, advice and output.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Sustainability strategy
- Team structure, composition and tenure
- Products and services
- Market share of sustainable investments
- Sustainable investment portfolio
- Sustainable investment highlights
- Environmental impact of clients' sectors
- Carbon offsetting
- Reporting and transparency

Best for Investment Research

The provider of investment research in the review period that has globally, regionally or at a country/territory level most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Strategy
- Team structure, composition and tenure
- Outputs, products and services
- Impact of research on investment performance
- Digital solutions

Best Chief Investment Office

The chief investment office within the review period that has globally or regionally most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global and regional

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Strategy
- Team structure, composition and tenure
- Products and solutions
- Digital solutions
- Investment portfolio performance
- Reporting and transparency of investment performance

Best for Philanthropic Advisory

The provider of philanthropic advisory services in the review period that has globally, regionally or at a country/territory level most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Strategy in this segment
- Team structure, composition and tenure
- Products and services; digital solutions
- Data evidencing social impact of research of philanthropic advice

- Examples of recent philanthropic advice

Best for Art Advisory and Financing ****NEW****

The provider of art advisory and financing in the review period that has globally most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Strategy
- Team structure, composition and tenure
- Products and services
- Digital solutions
- Recent deal highlights

Best for Commercial Real Estate Financing ****NEW****

The provider of art advisory and financing in the review period that globally has most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Strategy
- Team structure, composition and tenure
- Products and services
- Digital solutions
- Recent deal highlights

Best for International/Non-Resident Clients

- International China Clients
- Latin American Clients **NEW**
- Non-Resident Indian Clients

The provider within the review period that has most successfully globally impacted its international/non-domicile clients through its strategy, offering and advice.

Geographic Levels Awarded at: Global

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Market share of this segment
- Strategy
- Team structure, composition and tenure
- Products and services
- Digital solutions

Best Employer

The private bank or wealth manager within the review period that has globally most successfully impacted its employees through its training, development and support.

Geographic Levels Awarded at: Global

Eligible Entrants: Private banks and wealth managers

Assessment Criteria:

- Training and mentor programmes
- Career development and opportunity
- Remuneration, incentives and benefit schemes

Technology Providers

Best Technology Provider for Wealth Management ****NEW****

The wealth management technology provider in the review period that has globally or regionally most successfully impacted its business, its clients or the private banking and wealth management industry through its technology solutions.

Geographic Levels Awarded at: Global and regional

Eligible Entrants: Technology vendors

Assessment Criteria:

- Financial performance (revenue, profitability, growth)
- Market share and number of clients
- Strategy in this segment
- Products and services offered to private banks and wealth management firms
- Innovations and roadmap

Best Digital Solution for Wealth Management ****NEW****

The digital solution in the review period that has globally most successfully impacted its business, its clients or the private banking and wealth management industry.

Geographic levels awarded at: Global

Eligible entrants: Technology vendors

Assessment Criteria:

- Financial performance (revenue, profitability, growth)
- Market share and number of clients
- Strategy in this segment
- Products and services offered to private banks and wealth management firms
- Innovations and roadmap

Best Core Banking Solution for Wealth Management ****NEW****

The core banking technology provider in the review period that has globally most successfully impacted its business, its clients or the private banking and wealth management industry.

Geographic Levels Awarded at: Global

Eligible Entrants: Technology vendors

Assessment Criteria:

- Financial performance (revenue, profitability, growth)
- Market share and number of clients
- Strategy in this segment
- Products and services offered to private banks and wealth management firms
- Innovations and roadmap

Best Portfolio Management Solution ****NEW****

The portfolio management solution in the review period that has globally most successfully impacted its business, its clients or the private banking and wealth management industry.

Geographic Levels Awarded at: Global

Eligible Entrants: Technology vendors

Assessment Criteria:

- Financial performance (revenue, profitability, growth)
- Market share and number of clients
- Strategy in this segment
- Products and services offered to private banks and wealth management firms
- Innovations and roadmap

Trust Firms & Custody Services Providers

Best Trust Administrator ****NEW****

The trust administrator in the review period that has at a country/territory level most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Country/territory

Eligible Entrants: Trust administration providers

Assessment Criteria:

- Financial performance (revenue, profitability, growth)
- Market share and number of clients
- Strategy in this segment
- Team structure, composition and tenure
- Products and services

Best for Custody Services ****NEW****

The custody services provider in the review period that has at a country/territory level most successfully impacted its business, its clients or the private banking and wealth management industry through its strategy, offering and advice.

Geographic Levels Awarded at: Global

Eligible Entrants: Custody services providers

Assessment Criteria:

- Financial performance (revenue, profitability, growth)
- Market share and number of clients
- Strategy in this segment
- Team structure, composition and tenure
- Products and services

Methodology

Your Entry

- The entry process is your opportunity to showcase your institution's accomplishments and achievements within the review period **(1 October 2023 to 30 September 2024)**.
- Each entrant should submit via the awards portal by the **8 November 2024**.
- You will be able to amend your entry once it has been submitted up until the deadline, but entries cannot be modified after this date.
- In each entry form, there is the option to submit evidence in text boxes (supporting information can be submitted as attachments). These text boxes align to the criteria Euromoney will use to evaluate entrants for awards.
- We have outlined the evidence we would like you to include for each category in the portal and below in the categories. **Entrants that provide the information we request are more likely to perform better in our assessments.**
- Providing evidence of impact is critical to performing well in assessments. The scoring frameworks used by the judging panel and Euromoney's research team using a matrix that awards more points to those entries that are able to qualify that the examples they have given have been impactful for their business, their clients or the wider private banking and wealth management industry.
- Entrants should aim to provide supporting documentation – such as strategy decks, performance reports, investor presentations, data tables and charts, and qualitative overviews – to support their claims and illustrate their growth and performance over the review period. All data should be dated.
- **Entries *can* include confidential information that we can use to justify the granting of an award.** Anything **clearly marked confidential** will not be used outside of decision-making. Euromoney may use information not marked confidential in awards write-ups or research reports.

Assessment and Judging

- We aim to make the process as transparent as possible.
- Entrants will be assessed by a panel of industry experts and Euromoney's research team (including the Chief Research Officer, the Head of Research, the Head of Private Banking, the Head of Sustainability and others)
- Entrants will all be scored using frameworks specific to each category.
- Your entry and any information collected during an interview and secondary research, in addition to our team's knowledge of the market and businesses operating within it, will all contribute to your scores.
- Judges will be allocated categories based on experience and knowledge of these areas with more than one individual judging each category.
- Judges will not be allocated to categories where there might be an obvious or perceived conflict of interest.
- Judges must sign a non-disclosure agreement before reviewing any entries.
- Judges may, at their discretion, nominate entries for additional award categories if it qualifies for recognition in more than one area.

How to Submit

Entry Portal

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

Private Banking Awards 2025 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 identical log-in details.

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

Submission Form

Entrants are only required to make one entry per global, regional and country/territory submission.

The online submission form has text boxes that correlate to the award categories (e.g. 'Best for Digital Solutions' or information used to assess entrants for overall categories (e.g. '• Financial performance (AUM, credit rating, net new assets, profit before tax (PBT) growth, return on equity (ROE), revenue)').

If an entrant provides data in every section of the form, they will be considered for all possible categories available for the relevant geography.

Entry forms can be accessed through the portal after making the relevant selections from menus.

Research Interviews

As part of the research process, Euromoney invites entrants to participate in interviews. The interviews are an optional part of the process, but Euromoney encourages all entrants to take part.

The interviews are an opportunity to expand on and discuss the context of your submission, and to ensure Euromoney has all the information it needs to make the best decisions.

The interview lengths vary depending on the number of entries covered on a call. Any number of representatives from entrants are welcome to participate in the interviews.

Scoring

Judges and Euromoney's research team will score entries using scoring frameworks that align to the criteria for each category. Some examples of the criteria Euromoney uses are:

- Growth in market share or • Financial performance (AUM, credit rating, net new assets, profit before tax (PBT) growth, return on equity (ROE), revenue)
- Innovation or enhancements in products or services
- Innovation or enhancements in digital offering and technology

How highly judges and analysts score entries will be based on a scale designed to reward greater evidence of impact. For example, referencing a product or strategy and providing evidence of impact on a businesses' • Financial performance (AUM, credit rating, net new assets, profit before tax (PBT) growth, return on equity (ROE), revenue) or market share.

EUROMONEY

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

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