

Leading Trustees 2012

With the launch of the Citywealth International Financial Centre Awards last year, Citywealth continues to expand its knowledge of the trust market and International Financial Centres with frequent surveys to clients and peers asking for their feedback on providers. We asked private wealth peers to rank trustees on the following criteria:

Rate trustees from 1-10 each category for experience; knowledge; understanding; responsiveness; updates; flexibility; innovation; client service; value for money. We also asked if client referrers would use the providers again and whether they would recommend them. We have taken the overall scores of each trustee or group

and banded the trustees into tier one, two and three. Each tier is listed alphabetically by organisation name.

Here are our findings.

If you would like to give us some feedback on trustees, please contact Joe Bell jbell@j-p-c.tv for a survey form.

Tier 1 trustees with score: 90-100%



Jurisdiction: BVI

Dr Christoph Gutmann, Head Corporate and Trust and Sanchia Thompson, Assistant Managing Director at ATU General Trust (BVI) Limited

Client /peer comment: "Great responsiveness and value for money."



Jurisdiction: UK (London)

Pauline Gale, Partner and Managing Director, Bedell Trust, London

Client /peer comment: "Good knowledge and understanding of our clients needs. Excellent responsiveness and client care."

Karen Jones, Editor, Citywealth said. "Gale has been highly recommended by the uhwn industry over many years and is in our top twenty women in private wealth management. She is a consummate professional and highly respected in the private wealth industry."



Jurisdiction: Switzerland

Jim Parker and Phil Lenz, Butterfield Trust (Switzerland)

Client /peer comment: "Entrepreneurial and smart and with great service levels. Able to think outside the box."

Jim Parker, Country Head and Phil Lenz, Deputy Country Head, Butterfield Trust (Switzerland) Ltd got ten out of ten for every category. Karen Jones, Editor, Citywealth said. "Both have frequently received high praise and feedback from the private client industry and appeared without hesitation in our Citywealth leaders lists."

8% of the online votes on the Citywealth IFC Awards are coming from family offices and UHNW private clients