



NEWS RELEASE

05 November 2018

**swisspartners Advisory + Solutions Team
&
swisspartners Marcuard Heritage**

SHORTLISTED FOR THE *WEALTHBRIEFING SWISS AWARDS 2019*

swisspartners, one of Switzerland's foremost financial groups has been shortlisted under the categories of "Boutique Firm" and "Wealth Planning Team" for the *WealthBriefing Swiss Awards*.

Showcasing 'best of breed' providers in the global private banking, wealth management and trusted advisor communities, the awards were designed to recognise companies, teams and individuals which the prestigious panel of judges deemed to have 'demonstrated innovation and excellence during 2018'.

Commenting on the firm's shortlisting, Mr. David Sykes, CEO of swisspartners Marcuard Heritage said: "We are delighted to have been shortlisted for these prestigious awards. It is a great honour to be recognised in the shortlist and this is testament to the hard work that the team have put in over the last 12 months."

Dr. Christian Rockstroh, advisory of the swisspartners Advisory + Solutions Team said: "The nomination shows the importance of independent, integrated services for wealthy families. The swisspartners Advisory + Solutions Team consists of 25 specialists from a variety of financial services, all working together as dedicated mandate teams for the benefit of swisspartners clients."

ClearView Financial Media's Chief Executive, and Publisher of *Family Wealth Report*, Stephen Harris, was first to extend his congratulations to the shortlisted firms. He said: "The firms who have been shortlisted in these awards are all worthy competitors, and I would like to extend my heartiest congratulations. These awards are judged solely on the basis of entrants' submissions and their response to a number of specific questions, which had to be answered focusing on the client experience, not quantitative performance metrics. That is a unique, and I believe, compelling feature. These awards will recognise the very best operators in the private client industry, with 'independence', 'integrity' and 'genuine insight' the watchwords of the judging process - such that the awards truly reflect excellence in wealth management. Our aim is to make these annual Awards one of the brightest, and keenly contested highlights in the wealth management calendar."

Winners will be announced at a gala awards dinner which will be held in Geneva on 7 February 2019 at the Hotel President Wilson.

For media enquiries, journalists should contact:

David Sykes
CEO of swisspartners Marcuard Heritage AG
+41 58 200 0 400

NOTES TO EDITORS

1. About the shortlisted company



swisspartners is...

- one of the largest independent wealth planning and wealth management groups in Switzerland
- a one-stop-shop: we can take care of all aspects of our clients' wealth
- a hands-on company: we do not create problems, we solve them
- a creative and innovative wealth planning boutique with locations in Zurich, Geneva, Vaduz, Feldkirch/Austria and working with other jurisdictions such as Cyprus, Singapore, New Zealand, BVI and Cayman Islands
- a partner-owned business with over 100 people employed.

2. About ClearView Financial Media Ltd ("ClearView")

ClearView Financial Media was founded by Chief Executive, Stephen Harris in 2004, to provide high quality 'need to know' information for the discerning private client community. London-based, but with a truly global focus, ClearView publishes the *Family Wealth Report* group of newswires, along with research reports and newsletters, while also running a pan-global thought-leadership events programme.

With teams based in New York, London, Singapore, Switzerland, South Africa and Malaysia, the company is one of the fastest-growing media groups serving the financial services sector.