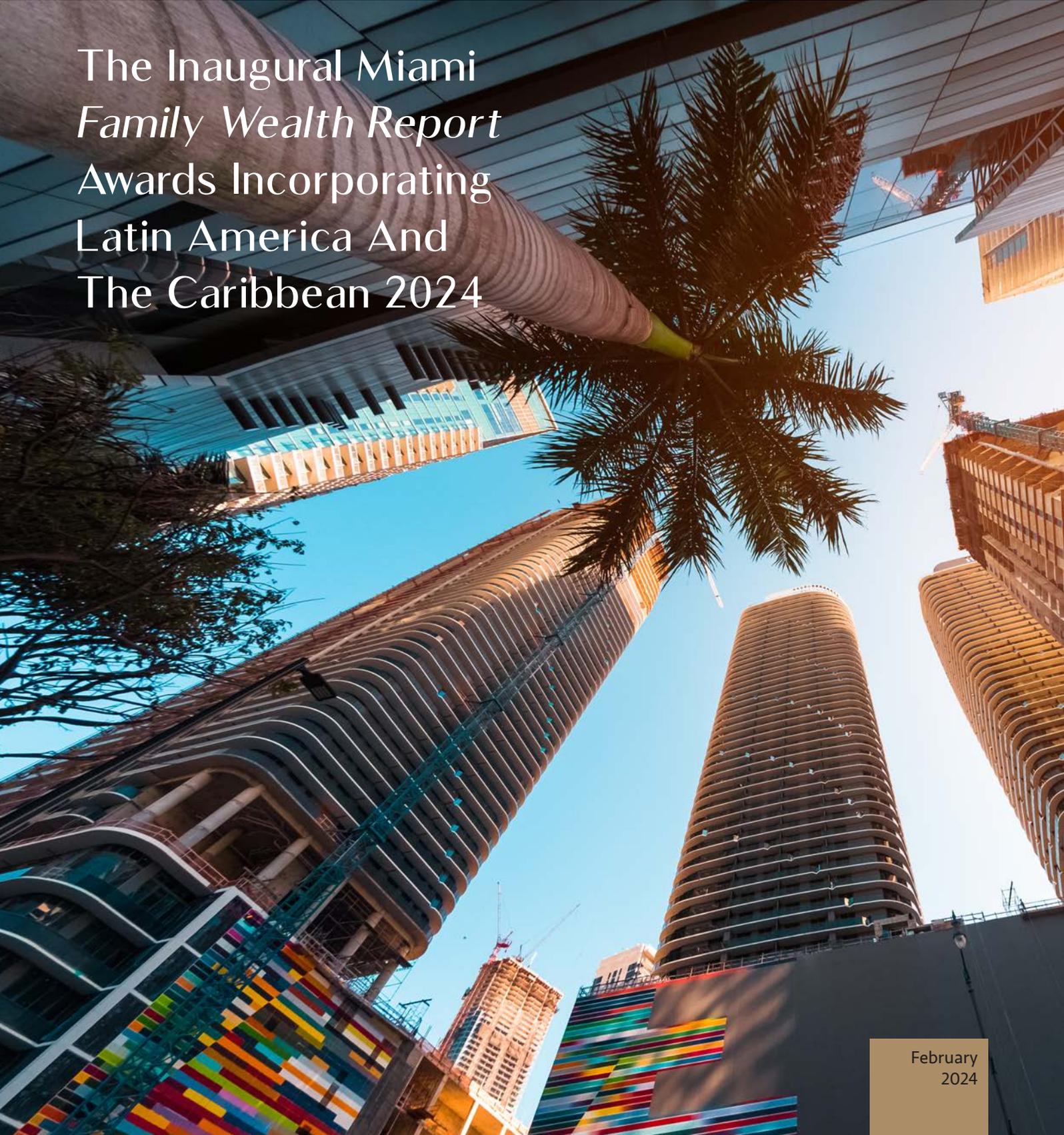




ACCLAIM

RECOGNIZING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY
THROUGH THE *Family Wealth Report* AWARDS PROGRAM

The Inaugural Miami
Family Wealth Report
Awards Incorporating
Latin America And
The Caribbean 2024



February
2024

Private banks and wealth managers need 24/7 risk vigilance.

But with millions of news items from thousands of sources and in multiple languages generated daily, how can they be sure to receive need-to-know alerts rather than irrelevant noise?

smartKYC's latest product, smartEYE, solves all of these problems.

- ✓ Watches the world's news and social media commentary in real-time, 24/7 to deliver precise risk alerts as soon as they are reported.
- ✓ Carries out automated news analysis ensuring alerts are risk-classified according to your risk framework, are specific to your client, and contain new (rather than repeat) information.
- ✓ Is truly multilingual so you can be as confident of your adverse media monitoring in languages such as Russian, Arabic or Chinese, as you are in English.

With smartEYE, private banks and wealth managers get risk-relevant, real-time alerts about their customers that allows them to act decisively and quickly. Compliance teams no longer have to wait for a periodic refresh cycle. Instead, they receive adverse media trigger events in the form of precise alerts, as that news breaks. smartEYE represents the ultimate solution for perpetual KYC risk monitoring. smartKYC proudly sponsors this awards ceremony and we congratulate all the winners!



Foreword

TOM BURROUGHES
Group Editor, *Family Wealth Report*

These awards are a chance for outstanding figures in the wealth industry focused on the Latin American and Caribbean market to shine. They can serve clients via the US or are based in specific jurisdictions. This market, which is complex, changing rapidly and requires a strong feel for specific culture and needs, deserves more attention. These awards are part of that process.

Awards are a great opportunity for industry practitioners to share ideas, catch up with old friends, make new ones, and get an idea of the kind of behavior that makes for an award-winning firm and individual.

The judging process is integral to the awards. Drawn from experienced and knowledgeable figures in the sector, the judges spend time and attention on scrutinizing entrants and drawing up a list of winners. Their focus and professionalism are deeply appreciated, and a full list of the judges panel can be viewed on the *Family Wealth Report* website.

In times when reputation is so important in driving business, these awards can build those reputations, motivate teams and be ways for firms to remind clients of the value of what they do. The organizers of these awards also values feedback and ideas about the program.

Wealth management is a sector that ultimately must stand or fall on the quality of the people who work in it. These awards are testimony to that quality.

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FAMILY WEALTH REPORT MIAMI AWARDS INCORPORATING LATIN AMERICA AND THE CARIBBEAN **WINNERS** 2024 31



OVERVIEW OF THE LATIN AMERICA AND CARIBBEAN SECTOR

The Caribbean wealth management sector has existed for decades, and it is now large. According to Statista, total assets under management could reach \$66.64 billion in 2024 and go up to more than \$70 billion by 2028. With the Latam market, AuM is slated to reach \$1.132 trillion, rising at an annual clip to \$1.52 trillion in 2028.

Some of that money is looked after locally, while a large chunk of it will be managed via centers such as Miami – a crucial international hub. The Bahamas, Cayman Islands and Panama, among others, are significant IFCs. And domestically, Florida’s wealth market has benefited from an influx of HNW individuals to the state from other, more highly taxed, parts of the US. The relative stability and legal certainty of doing business in Miami is a strong selling point.

A cluster of businesses have arisen to serve Latam and Caribbean wealth managers and clients. Examples include wealhtech firm First Rate, which in January 2023 bought Chilean-based Finantech; in the trusts sector, for example, there is Trident Trust; FigTree Financial has been building family office solutions and wealth planning services in the Caribbean. In Miami, transatlantic multi-family office ALTI Tiedemann Global is prominent in the portfolio management area for serving clients. Chicago Atlantic and Bank of Nova Scotia are also in the mix.

This is an industry that defies easy generalization and a fascinating one. The outlook for growth appears to be bright.

Why Wealth Managers are the Ultimate Private Market Matchmakers

(in partnership with Hywin Wealth & VP Bank)

This report tackles both the supply and demand for private market opportunities in both the Asia-Pacific region and globally, a topic which will continue to be hugely important for the wealth management industry as H/UHNWs seek enhanced returns and diversification in a challenging investment environment and billions of “dry powder” await deployment.

External Asset Managers in Asia - New Directions for Rapidly-Expanding Sector

(in partnership with UBS)

Our second annual report examining the growth of Asia’s EAM sector, covering both the powerhouses of Singapore and Hong Kong, and emerging markets like Thailand and the Philippines. This study looks at the growth prospects for independent advisors in the round as they seek to tap the region’s booming wealth and growing client acceptance of the EAM model.

Family Office Focus: An Update of the Industry’s Efficiency in Accounting and Investment Analysis

(in partnership with FundCount)

A deep dive into the key technological and operational challenges facing family offices in their accounting and investment analysis activities. Based on surveys and interviews

among family offices managing over \$72 billion in assets, this is an invaluable benchmarking tool for the sector which presents fascinating insights into future developments from a range of industry experts.

Applying Artificial Intelligence in Wealth Management - Compelling Use Cases Across the Client Life Cycle

(in partnership with Finantix & EY)

This comprehensive report identifies elements of the institution and advisor’s workloads that are ripe for AI amelioration, and points the way for firms seeking to maximise the competitive advantages offered by new technologies. AI experts and senior industry executives enrich each chapter, answering crucial questions on risk, KYC/AML, compliance, portfolio management and more.

Decoding The Digital Landscape for UHNWIs

(in partnership with Jersey Finance)

This report explores the digitalisation of - and digital assets in - Jersey’s wealth management sector. It explores the shifting sands - both economic and regulatory - on which the digital sector rests.

Winning Women in MENA

(in partnership with First Abu Dhabi Bank)

This ground breaking new research examines the growth of female

entrepreneurship in the region. More specifically it looks at how women are driving family office strategy as well as the relationship between MENA’s UHNW female clients and the wealth management industry.

Technology & Operations Trends in Wealth Management 2023

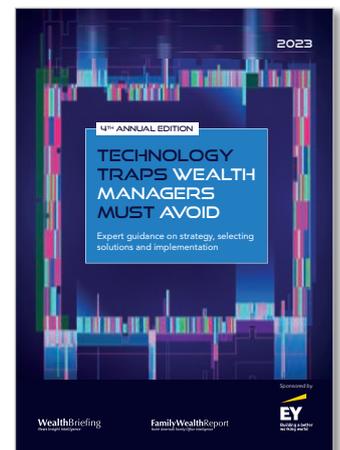
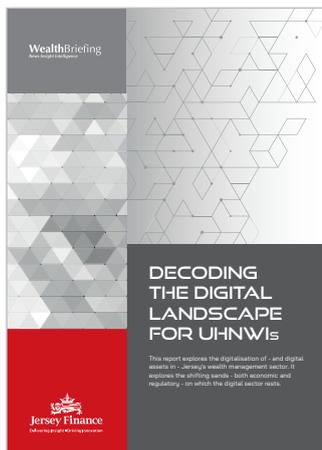
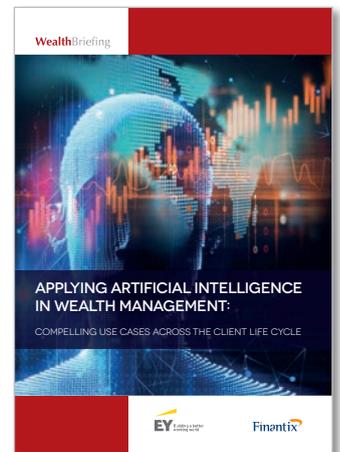
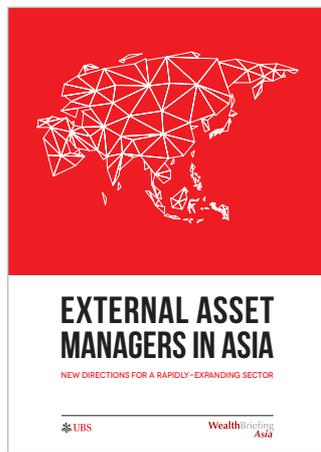
(in partnership with SS&C Advent)

This succinct yet wide-ranging report shines a light on both macro and micro trends, beginning with industry growth sentiment and ending on operating model evolution, taking in every key area of development in between. It brings together datapoints and candid comments senior executives at leading consultancies across the world’s major wealth markets to create an invaluable peer benchmarking tool.

Technology Traps Wealth Managers Must Avoid 2023

(in partnership with EY)

With EY providing the overview, this report draws on the front-line experience of many of the technology sector’s biggest names, in recognition of the fact that they are the ones going in to solve wealth managers’ most pressing problems and have typically seen the ramifications of firms’ choices play out numerous times – not to mention in various contexts globally.



The Judging Panel



LOWRY BRESCIA
Associate Director
Stonehage Fleming
Family Office US
Division



PHILIP N. CAREY
Principal and CEO
Lion Capital Advisors
LLC



WENDY DELMAR
Chief Executive Officer
Caribbean Association
of Banks



NATALIE E. GLITZENHIRN-AUGUSTIN
Attorney-at-Law
Glitzenhirm Augustin
& Co.



MARTIN HEALE
Director
Schroder US Wealth
Management



JOSEPH KELLOGG
Head of Wealth Planning
WE Family Offices



DARRELL KING
Managing Director,
Americas
Crestbridge Fiduciary



SIMONE E. MARTIN
Director, Special Projects
BVI Financial Services
Commission



GIO MASO
Family Office
Advisory Services
EY



TANYA MCCARTNEY
CEO & Executive Director
The Bahamas Financial
Services Board



JAMIE MCLAUGHLIN
Founder and Chief
Executive
J. H. McLaughlin & Co.



MIKE MCNAMARA
Partner and Former CEO
Dentons



OSCAR PAEZ
Consultant
The Family Business
Consulting Group



STEPHEN E. PROSTANO
Partner, Head of Family
Advisory Services
PKF O'Connor Davies



PETER J. RANDAZZO
President
Trident Trust Company
(South Dakota)



JOSEPH W. REILLY JR.
CEO and Founder
Circulus Group



APRIL RUDIN
Founder and President
The Rudin Group



CARLOS VALLADARES
Founder
Del Mar Capital, LLC



GUILLERMO VERNET
CEO and Founder
Kandor Global



MICHAEL WAGNER
Co-Founder and Chief
Operating Officer
Omnia Family Wealth



NARO ZIMMERMAN
Deputy Head of Caribbean
- Private Client Services
JTC





Charting smooth courses.

We believe the best opportunities in private credit are found in lower mid-market space, where bank credit is scarce and larger private credit firms cannot afford to go. In this space, Chicago Atlantic shines: Not only do they find good investments from a balance sheet and growth perspective, but their particular brand of creative credit structuring affords the protection of debt, higher current yields and potential of upside.

Rafael Alcantara Lansberg,
Founder & Managing Director,
Harbor Ithaka

Family Wealth Report AWARDS 2024

MIAMI, LATIN AMERICA & CARIBBEAN

WINNER
Alternatives Provider (Miami)

Chicago Atlantic

WINNER
Rising Star Under 40 (Miami)

Raúl Markos - Chicago Atlantic



CHICAGOATLANTIC

Preserving capital and generating
income through alternative investments.

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Pioneering Alternative Investments With A Tailored Approach



Founding Partners (left to right): **Tony Cappell, John Mazarakis and Andreas Bodmeier**
Chicago Atlantic

Chicago Atlantic is a private market investment manager combining deep expertise with an entrepreneurial approach to multi-asset class investing. The firm seeks to capitalize on investment opportunities that are time-sensitive, complex or in dislocated markets where risk is fundamentally mispriced.

Please explain why you think your firm has been able to achieve a high level of success.

We invest in markets where demand for capital far exceeds supply, strengthening our ability to maximize risk-adjusted returns. Success in our industry depends on adapting swiftly and making well-informed decisions, which we achieve through an unwavering commitment to collaboration, robust relationships and data-driven decision making.

- **Collaboration:** We channel the diverse skill sets of our experts into collective innovation. Whether aligning investment strategies with industry analyses or incorporating legal insights into financial structuring, cross-collaboration ensures a holistic approach to decision-making.
- **Robust Relationships:** Our collaborative spirit extends to investor relationships, where we cultivate trust and credibility through transparency on financial strategy and performance. We've built a network of strategic partnerships that enhances our ability to source and execute successful deals. Our relationships with borrowers include an understanding of their unique needs, allowing us to structure deals that are mutually beneficial.
- **Data-Driven Decision-Making:** We implement focused strategies based on detailed quantitative analyses, risk assessments and industry insights to assess potential returns.

What challenges have you had to surmount to get to this point?

True leadership in alternative, multi-asset class investing requires nuanced expertise across burgeoning industries. We must decipher risk-return dynamics amidst industry distortions conventional metrics may not fully capture. To do this, we've taken on the

demanding task of developing risk assessment models tailored to the intricacies of these markets by constructing analytical frameworks, engaging in comprehensive due diligence, leveraging data analytics, cultivating market insights, and establishing operational protocols to stay ahead of evolving market conditions and emerging trends. This dynamic process has forged the essence of who we are today: agile, innovative, adaptive, and strategic.

How do you measure success?

Much like the intricate craftsmanship required to design a perpetual calendar watch, a successful asset management firm demands meticulous attention to detail and an incessant dedication to delivering stable, repeatable results. We constantly evaluate, price and reprice the risk and return of investments, and just like a complex watch, our true components – our people, processes and products – only succeed when working in synchronization to deliver top-tier results. It is this kind of fine-tuning that drives us as founders.

If there is one thing you would like to change about the wealth management industry, what would it be?

We encourage RIAs, family offices and high net worth individuals to engage with smaller, niche-focused managers who have the agility to tailor investment strategies to the unique objectives and risk tolerance of their clients in a cost-effective way. Imperatively, those managers must be equipped with robust risk management frameworks and advanced analytics to accurately assess risk and return.

This personalized approach coupled with advanced risk assessment stands to provide unparalleled value by delivering tailored, high-impact investment strategies. Smaller, niche-focused managers can enrich the industry's ecosystem with innovative approaches and often seize opportunities overlooked by more conventional firms. By incorporating these varied perspectives, the industry can become more dynamic, adaptive, and responsive to the nuanced needs of investors. This evolution will not only foster healthy competition but propel the entire sector towards a new era of creativity.



 Family Wealth Report
AWARDS 2024
MIAMI, LATIN AMERICA & CARIBBEAN

WINNER
Best Overall Private Bank (Latin America)

EFG

Entrepreneurial thinking meets wealth management.

We are delighted to be awarded ‘Best Overall Private Bank (Latin America)’ by Family Wealth Report.



efginternational.com

EFG International's global wealth management network operates in around 40 locations worldwide, including Zurich, Geneva, Lugano, Lisbon, London, Monaco, Luxembourg, Dubai, Hong Kong, Singapore, Sydney, Bogotá, Grand Cayman, Lima, Miami, Montevideo, Punta del Este and Nassau. In the United States, brokerage and asset management services are provided through EFG Capital International Corp. and EFG Asset Management (Americas) Corp. located at 701 Brickell Avenue, 9th & 13th Floor, FL 33131 Miami, T +1 305 482 8000.

EFG Enforces Their Commitment To Latin America



Sanjin Mohorovic
CEO
EFG

Please explain why you think your firm has been able to achieve a high level of success?

EFG is a leading Swiss private bank with a presence in major financial centres and growth markets around the globe. We serve clients in around 40 locations, offering them private banking and asset management services. Our commitment to delivering truly client-centric advice, first-class service and innovative solutions is one of the reasons why clients chose EFG as their preferred financial partner.

With our entrepreneurial approach, we have created a new private banking experience. Our distinctive CRO model is a key element of our success story, combining personalisation and a close proximity to clients with continuity, efficiency and scale.

What has led to your firm's success and what role did your colleagues play?

Alongside our unique client approach, the key factor that sets EFG apart is our people. As a financial services provider, we believe that people are our most important asset since our long-term success ultimately depends on their ability to create lasting value – today and for the future.

With their expertise, experience and dedication, my colleagues are instrumental in delivering the best-in-class service and advice that our clients expect. To ensure that we can continue to attract, nurture, and retain the talented professionals we need to serve our clients, EFG is committed to being an employer of choice and to fostering an inclusive working environment and culture where all our people are valued equally and can thrive.

Where in the world do you operate – are you mainly a domestic player or international?

EFG operates globally, with a network spanning Europe, Asia Pacific, the Americas and the Middle East. Latin America is of strategic importance for

our bank and we have established a strong presence in the region, with operations in Bogotá, Lima, Montevideo, Panama City, Punta del Este, Rio de Janeiro and São Paulo, as well as Nassau and George Town.

Our footprint also includes a significant presence in Miami, which serves as our primary wealth management hub for international clients in the region, and we have booking centres in Switzerland, the Bahamas, and the Cayman Islands.

EFG is one of the few global private banks to offer a full range of private banking, US broker-dealer and custody services to private clients and Independent Asset Managers in Latin America.

What are your ambitions for the business?

EFG entered its 2023-2025 strategic cycle from a position of strength. Looking ahead to 2025, we want to sustain our growth momentum and to further drive profitability.

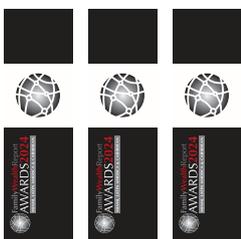
Our strategy for Latin America is based on four key pillars:

First, we want to grow organically with our existing team of highly skilled CROs.

Second, we are actively hiring additional top talents as part of our growth strategy to expand our existing business in target markets in the region.

Third, we are reinforcing our commitment to Latin America, as demonstrated by the recent opening of an investment advisory office in Panama City.

Finally, other areas of strategic focus include the digitisation and enhancement of our platform. By leveraging a digital framework and open architecture approach, we aim to attract new individual and institutional clients and to ultimately boost revenues and expand our share of wallet.



Winner

- **Asset Manager (Latin America)**
- **Team Servicing UHNW Individuals (Latin America)**
- **Best Overall Private Bank (Latin America)**

2024



FIGTREE
FINANCIAL

YOUR LEGACY. OUR FOCUS.
YOUR LEGACY. OUR FOCUS.

We are proud to be named the **winner in the Family Wealth Report Awards 2024**, Latam & Caribbean: Family Office Services and Wealth Planning Solution, Caribbean.

Supporting Family Business Legacies



Daniel Farmer
Executive Chairman
FigTree Financial

Please explain why you think your firm has been able to achieve a high level of success?

We believe our clients appreciate that we are focused on truly listening to their specific needs, presenting our strategies, and planning to meet those particular needs over a period that makes sense to them. We are not transactional and do understand that we translate well to the clients we focus on which are mainly entrepreneurial families that still run their family businesses.

What challenges have you had to surmount to get to this point?

We have had to build out our services and capabilities to serve our clients in-house as there are few options for outsourcing to meet the unique needs of our clients. Additionally, we have had to navigate the continuous changes to the offshore market whether that be regulatory, tax, and overall de-risking making it very difficult for many of our clients to manage or meet their wealth planning and estate plans.

What has led to your firm's success and what role did your colleagues play?

Again given our focus on truly listening to the needs of our clients/families we have been able to be there for them during the ever-changing landscape in the offshore market as well as during the difficult period of covid where we had clients in very different positions as a result of the impact on their family businesses. Our team stayed connected and coordinated even though there were a few new members just before we entered the uncertain period of COVID. We couldn't be where we are or achieve what we have if we didn't have the entire team's dedication. What was also very

telling was the team always felt we could do more and should be doing more for each of our clients rather than realizing how well we performed during a very difficult period.

Explain what benefits your firm and colleagues get from these awards.

Truly this is a very nice step back for us to acknowledge how far we have come and to really celebrate the wins. We have a highly dedicated and performance-oriented team and sometimes we can be a little too tough on ourselves and purely focus on our clients' needs that we forget how far we have come.

How and in what ways do you measure success?

Like most companies we would have our KPIs that we focus on to ensure that the firm is operating in the manner we feel will meet the needs of our clients in a way that they will appreciate. That said when existing clients refer other friends or family members to us, we take that as the biggest tip of the hat. Additionally, when it becomes visible to us that an existing client seems more relaxed and focused on spending time with their families, we take that as a solid win as we know that we have then truly assisted them with their needs and concerns.

What are your ambitions for the business?

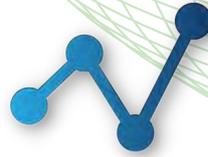
We would like the business to develop to be a leading MFO serving entrepreneurial families and businesses. We wish to ensure we continue to evolve to meet the needs and concerns of these clients as they evolve through various business cycles and generations to ensure the continuity of their legacy as they have envisioned.

CONTACT
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FIRST RATE FINANTECH



BEYOND THE NOISE OF GENERIC PLATFORMS.
TRUSTED EXPERTISE, CAPABILITIES, & SOLUTIONS THAT DELIVER.

First Rate is a trailblazer in the WealthTech industry, boasting over three decades of experience and a commitment to remaining privately held. Founded on a 300-year mission, the company focuses on reflecting God's character through a global business impacting coworkers, clients and communities. The acquisition of Finantech, a Chilean-based family office and private banking reporting platform, has expanded First Rate's global footprint and integrated locally-developed solutions with their award-winning machine learning and artificial intelligence offerings. The company's ambitious 2024 plans include further expansion into Latin America and launching new solutions for a truly personalized wealth journey.

Stay in the loop for exclusive updates and early access by contacting us today!

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CONSOLIDATED REPORTING | ARTIE™ INSIGHTS**



FIRST **1R** RATE

LOVE. GIVE. SERVE. ENJOY.



A Globally Distributed Impact in WealthTech

From portfolio management capabilities and AI/ML-enabled analytics to data acquisition, investment reporting, and support for alternatives, First Rate ensures that no corner of the financial world is beyond reach. *"We aim to further solidify our position in the market, exploring innovative avenues and expanding our client base across Latin American and Globally. Continuous evolution and our investing in our people is key to sustaining success."* José Antonio Honorato, Managing Director of First Rate Chile.

Pioneering WealthTech Excellence on a 300-Year Mission

First Rate stands as a trailblazer in the WealthTech industry, boasting over three decades of experience in delivering innovative technology solutions globally. What sets us apart is not only our extensive tenure but our steadfast commitment to remaining privately held. Unlike many peers eyeing exits, we envision a perpetual journey as a holding company, dedicated to serving co-workers, customers, and communities worldwide. Our founders, Dave and Trina Stone, along with the current leadership, view First Rate as more than a business entity; it's a 300-year mission to reflect God's character and positively influence business practices globally through our values of love, give, serve, and enjoy. This relational corporate philosophy, known as First Rate Living, is the cornerstone of our operations, enabling us to provide long-term access to technology and world-class service.

Transformative Acquisition and Comprehensive Solutions

In our pursuit of continuous innovation, we recently solidified a collaboration with Finantech, a family office and private banking reporting platform based in Santiago, Chile. This strategic acquisition enhances our global footprint, offering clients in the Americas an expanded suite of products and services. Finantech's locally-developed solutions, such as Data Feed, Aggregga, and Reporta, seamlessly integrate with our award-winning machine learning and artificial intelligence offerings, providing clients with unparalleled tools to navigate complex portfolios.

Ambitious Global Expansion Focused on Family Offices

Looking ahead, our ambitions for First Rate extend beyond geographical boundaries. While a focus for 2024 will be expansion into other countries in Latin America (LatAm), we are also committed to seeding profitable hubs and strategic bases globally. Our goal is to empower our local teams and partner with other local WealthTechs to operate independently, making a meaningful impact on customers, co-workers, and communities. The recent collaboration with Finantech serves as a testament to this vision. As we expand globally, we aim to redefine the wealth management landscape, particularly in the family office sector by offering a suite of micro services rather than an all-in-one platform. *"Beyond the noise of generic platforms, our strategy is to offer trusted expertise, capabilities, and solutions that deliver tangible outcomes for all stakeholders."* Grayson Greer, Managing Director of Global.

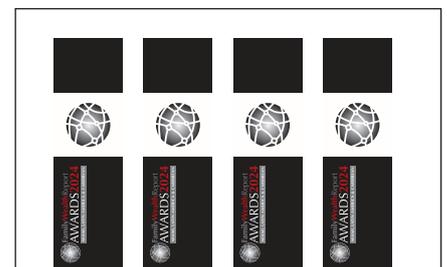
"Our strategic approach involves leveraging our 300-year mission philosophy to positively influence business practices, creating sustainable value for clients across LatAm and beyond."

Gratitude for Recognition and Impact Measurement

We extend our deepest gratitude for this recognition for the Miami, Latin America, and Caribbean Family Wealth Report Awards. Awards serve as affirmations of our commitment to excellence, and we are honored to be acknowledged. At First Rate, success is not solely measured in financial metrics but in the impact we create. Our 10% commitment of top-line revenue to nonprofits in the regions we operate reflects our dedication to making a positive difference. It's through these meaningful contributions that we gauge our success, ensuring that our legacy transcends traditional measures and leaves a lasting imprint on the communities we serve.



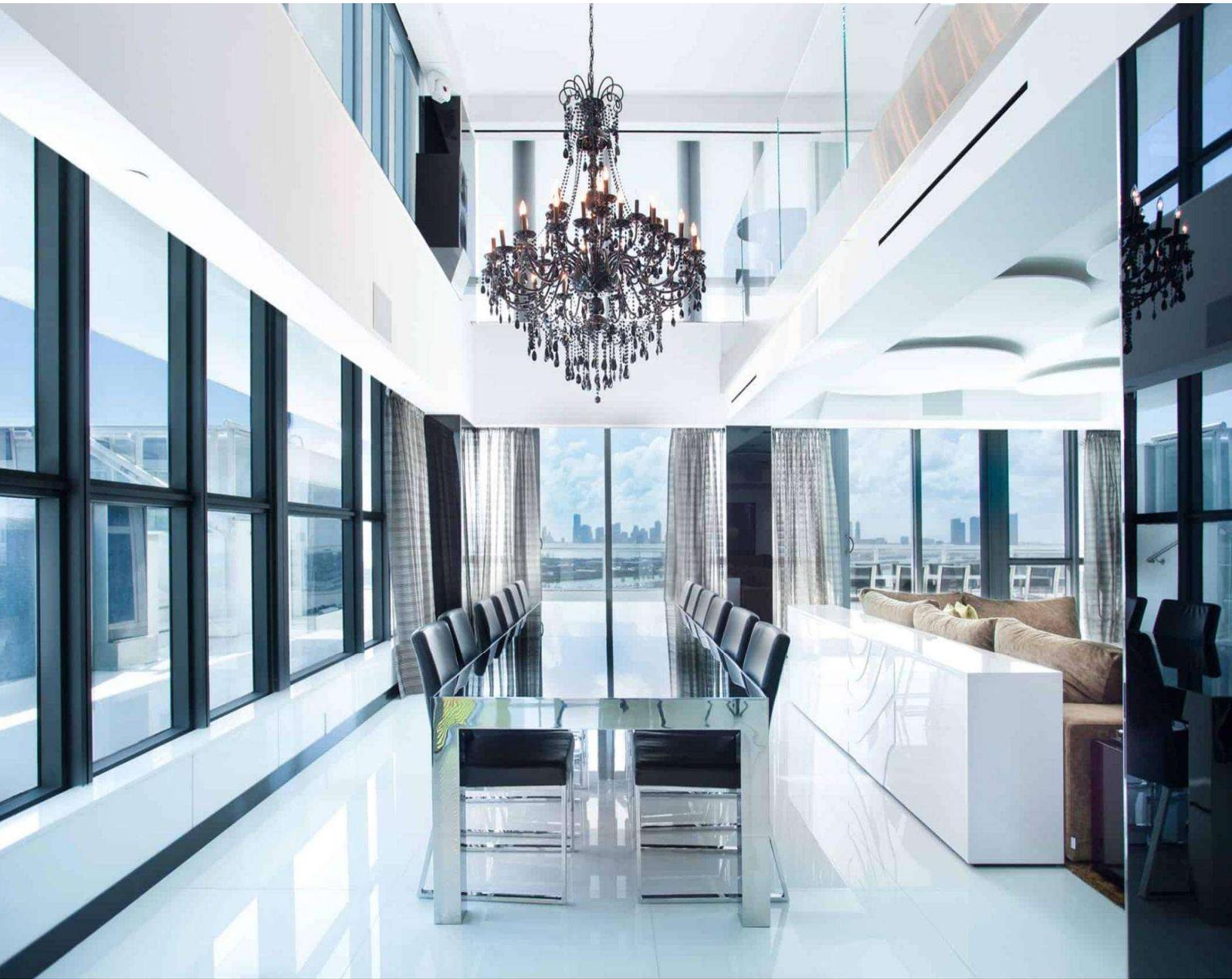
Grayson Greer
Managing Director
First Rate



Winner

- **WealthTech Solution (Latin America)**
- **Digital Capability (Latin America)**
- **Family Office Solution (Latin America)**
- **Wealth Planning Solution or Team (Latin America)**

HOWARD INSURANCE



 Family Wealth Report
AWARDS 2024
MIAMI, LATIN AMERICA & CARIBBEAN

WINNER
Insurance Offering (Miami)

Howard Insurance

 Family Wealth Report
AWARDS 2024
MIAMI, LATIN AMERICA & CARIBBEAN

WINNER
Female Executive (Miami)

Andrea Dykes - Howard Insurance

A Visionary Approach To Insurance And Risk Management



Andrew Howard
President & CEO
Howard Insurance



Please explain why you think your firm has been able to achieve a high level of success?

Howard Insurance has been able to achieve and maintain its success due to our commitment to better client outcomes and our attention to the client experience. MFOs, attorneys, and CPAs, who have been a great source of repeat referrals, tell us that they appreciate our deep expertise in helping clients navigate the ever-changing and complex insurance landscape. Our independent advice is valued, and we provide insights/expertise in our recommendations.

What challenges have you had to surmount to get to this point?

The insurance industry and Howard Insurance have faced challenges navigating a demanding ever-changing insurance landscape, adapting to evolving regulations and market complexities. We've learned the importance of aligning with other client advisors including wealth management firms, MFOs, attorneys and CPAs with whom we share responsibility for client satisfaction. We work with firms whose values resonate with our own, ensuring a meaningful partnership. Being selective with the advisors we work with has allowed us to maintain integrity and focus on collaborations that reflect our mission and vision.

What has led to your firm's success and what role did your colleagues play?

The success of our firm can be attributed to our commitment to talent development, a visionary approach to changing industry paradigms, a dedication to client education, and an integrated

perspective that considers the broader financial landscape. Together, these elements have created a foundation for sustained growth and excellence within the insurance and financial services sector.

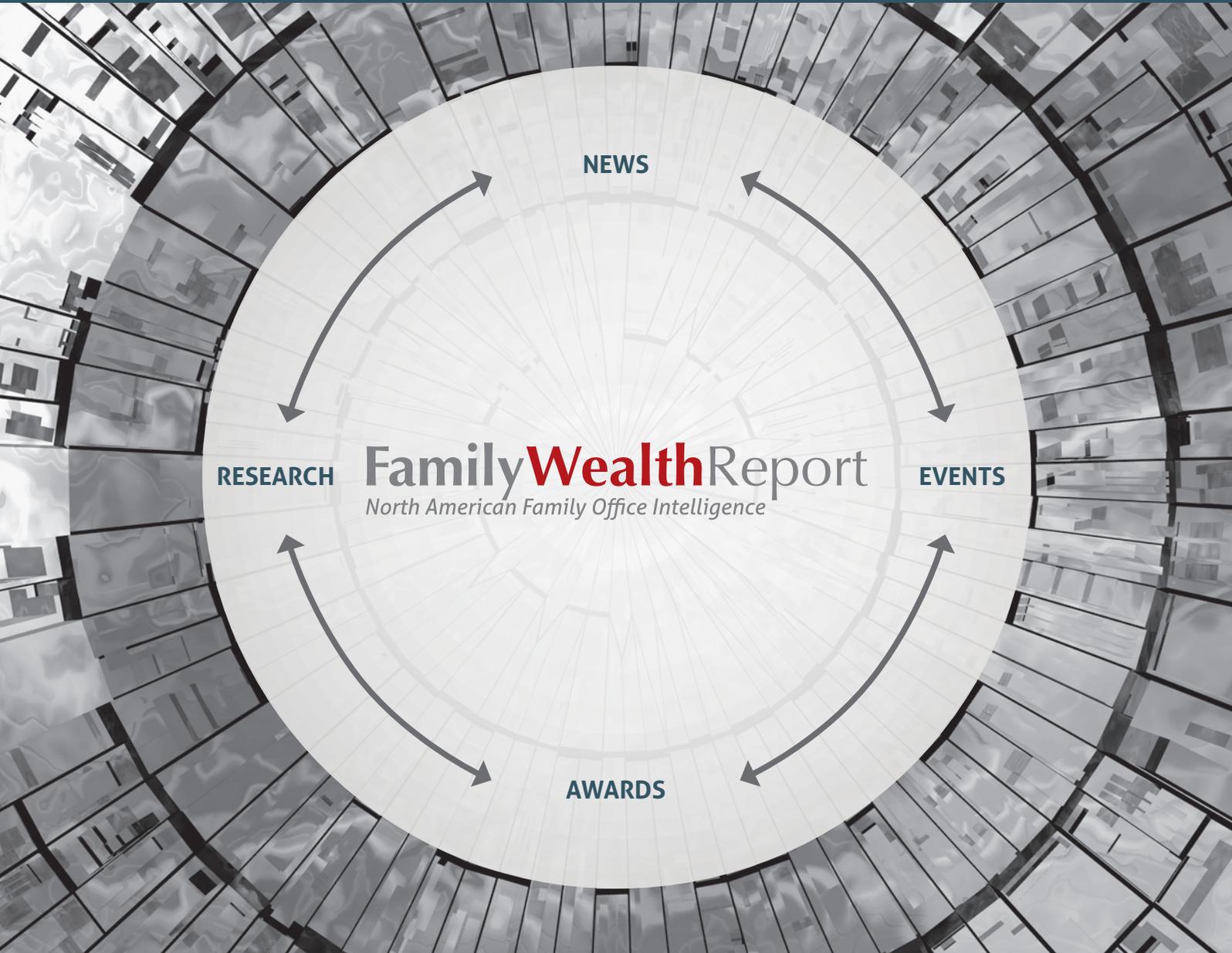
Explain what benefits your firm and colleagues get from these awards.

Winning an award for best in class for UHNW insurance advice brings several benefits to our firm and colleagues. It reinforces our reputation and credibility in the industry, showcasing our expertise and commitment to excellence. This industry recognition attracts like-minded MFOs, attorneys, CPAs who are seeking exceptional insurance advice for their clients, thereby expanding our clientele.

Additionally, it boosts team morale and motivation, fostering a sense of pride and validation among colleagues for their hard work and dedication. Ultimately, it solidifies our position as leaders in providing exceptional insurance guidance, opening doors to new opportunities and partnerships within the industry.

Our vision and leadership have guided our firm to adopt innovative strategies, keeping us at the forefront of industry trends and advancements. This proactive approach allows us to adapt swiftly to changes, ensuring that our clients receive cutting-edge solutions tailored to their evolving needs.

"Winning industry awards is a validation of our commitment to excellence."



FAMILY WEALTH REPORT - ALWAYS AT THE CENTRE OF YOUR 360° VIEW ON THE WEALTH MANAGEMENT LANDSCAPE

Family Wealth Report is the leading source of news and analysis for over 12,000 wealth management professionals in the US and Canada. Over 16 years it has amassed a readership derived from the largest and most prestigious North American Firms providing advice to HNW and UHNW clients.

Register for a free trial
www.familywealthreport.com



Andrea Dykes
Managing Partner
Howard Insurance



Continued...

How and in what ways do you measure success?

In gauging our success, we adopt a comprehensive approach that encompasses both quantitative and qualitative metrics, reflecting the unique nature of our services catering to our clientele and their other outside advisors. Recognizing the distinctive needs of our clients, we place significant emphasis on our own internal quantitative benchmarks to ensure that our success metrics align precisely with the bespoke services and elevated standards we provide. Client satisfaction and engagement are key qualitative indicators, and we actively seek feedback from our clients to ensure that their unique expectations are not only met but exceeded.

From whom and what do you get inspiration?

Understanding the unique challenges, aspirations, and feedback from our clients and referral network, offers an active listener invaluable insight into their evolving needs. This client-centric approach ensures that our ideas and strategies are not only relevant but also tailored to address the specific requirements of those we serve. Engaging in open discussions with industry leaders and colleagues, exchanging ideas, and learning from their diverse perspectives contribute significantly to my creative thought process.

What are your ambitions for the business?

My ambitions and goals for the business are deeply rooted in fostering innovation while maintaining a client-centric approach. I aspire to lead a team dedicated to pioneering solutions that simplify insurance complexities and prioritize customer satisfaction. Building strategic partnerships, leveraging data analytics for tailored products, and fostering a culture of continuous improvement are the keystones of my vision for the

business's future. The industry is ripe for evolution, and implementing changes that enhance accessibility, transparency, and personalization is imperative.

Streamlining processes, integrating AI for better risk assessment, and fostering financial literacy to empower clients are key changes I envision. Embracing sustainability practices and adapting to shifting consumer needs are also vital for the industry's growth and relevance in a dynamic market landscape. This recognition serves not as a culmination but as a catalyst for propelling the industry forward. I am resolute in my commitment to spearheading transformative initiatives, steering the company towards greater heights, and ensuring that insurance remains a reliable and empowering tool for individuals and businesses alike.

If there is one thing you would like to change about the wealth management industry, what would it be?

A more inclusive and diverse wealth management sector brings a variety of perspectives, experiences, and insights. This diversity is not only essential for fostering a culture of innovation but also for better understanding and catering to the diverse needs of our UHNW clients. Broader representation within the industry will undoubtedly lead to more comprehensive and nuanced insurance solutions that resonate with a wider range of clients.

Embracing technology is another transformative change needed for the industry. Technological advancements, such as artificial intelligence, predictive models for insurance, more automation in the claims process, and integration into wealth management in a more holistic service model, present immense opportunities for enhancing efficiency, security, and the overall client experience.

Integrating these technologies into insurance and risk management can streamline operations, provide data-driven insights, and offer a more personalized and responsive service to our clients.

**FAMILIES-IN-BUSINESS
MOST TRUSTED ADVISORS**

R.N. Trevinyo-Rodriguez
& Asociados

Consultoría e Investigación en Empresas Familiares



Passion, Focus, Insight & Experience

Grooming *Family-Wealth Stewards*

Enabling *Business Growth*

Entrusting *Legacies*

Building Family-Wealth Dynasties



www.trevinyorodriguez.com

rosanelly@trevinyorodriguez.com | WhatsApp +52 8116908639

Building Family-Wealth Dynasties Is Our Business



Rosa Nelly Trevinyo Rodriguez
Founding Partner & CEO
R.N. Trevinyo-Rodriguez & Asociados

Please explain why you think your firm has been able to achieve a high level of success?

For nearly a quarter-century, we have been serving, educating and advising, multigenerational families-in-business worldwide. We help them to become responsible owners and stewards of their family wealth by encouraging them to learn, work, negotiate and grow together. Our goal is to build family-wealth dynasties around the globe.

As most trusted advisors, we exhibit four key features that make our services valuable and ahead of the field: Passion, Focus, Insights, and Experience.

Passion: Our motivation is to transform mindsets. We like what we do, we strive to excel, and we only take family and business projects where we can help families-in-business thrive.

Focus: Family dynamics shape the way we negotiate and invest. We protect and nurture wealth by addressing, too, the emotional and relational complexities of the enterprising family.

Insights: Research feeds our practice. We create rigorous research and translate it into easy to read, practice-oriented insights for families-in-business and advisors.

Experience: We do not improvise. We know family relationships are delicate and easily damaged. We evaluate pros, cons, and impacts before intervening.

How and in what ways do you measure success?

The bottom line is a necessary, but not a sufficient, condition for our business success. Our appraisal also takes into account, and highly values, how long our many clients have been with us and how much they have evolved in their family and business dynamics.

Many of the enterprising families we serve have been choosing us for several decades. During this time, we've been

helping them with their family constitutions, establishing and strengthening their governance structures – family businesses' board of directors, family offices' investment committees, family councils, foundations' board of trustees – and mentoring their next generation members as valuable board members. No doubt, there has been a tangible transformation, both business and family-wise.

Explain what benefits your firm and colleagues get from these awards.

First, I would like to say I am honored to receive this award. I want to thank the families-in-business we work with for their trust, and our worldwide colleagues for their commitment to push forward excellence, honesty, and professionalism in family business advisory and education. Building up this field with you all is a huge privilege.

I hope this award will help our firm expand its alliances with peer companies to better serve the needs of our client-families. Still, the **remarkable value** I see in receiving it, is that it may drive families-in-business to rethink and adjust their paradigms regarding next-generation members' training and inclusion in wealth management matters.

In our work, we have encountered many ill-equipped next generation owners or owners-to-be, thus, it's crucial for enterprising families to think about how they are educating next-gens to manage and nurture wealth. Remember: Nothing but good ownership makes long-lasting family-wealth dynasties.

"Grooming family-wealth stewards; enabling business growth and entrusting legacies is our job, but... building family-wealth dynasties is our business."





FamilyWealthReport
AWARDS2024

MIAMI, LATIN AMERICA & CARIBBEAN

WINNER

Family Office Services (Miami)

Rose Capital Advisors

WINNER

Philanthropy Advisory (Miami)

Rose Capital Advisors

Rose Capital Advisors is

honored to be recognized by **Family Wealth Report** for our commitment and dedication to philanthropy and our community. We are committed to help our clients with their charitable giving, family foundations, donor advised funds, as well as determining what is most important to them.

We invest in you. **R©S E**
CAPITAL ADVISORS

Rose Capital Advisors Success Lies In Their Unique Value Proposition



Michael Rose
Founder and Managing Partner
Rose Capital Advisors

Rose Capital Advisors, located in Miami Beach, is honored to have recently received two prestigious *Family Wealth Report* awards for Family Office Services and Philanthropy. With a global reach, we extend our comprehensive financial planning, portfolio management, and investment advisory services to a diverse range of clients across 20+ countries and 5 continents.

As an independent, boutique SEC registered investment adviser, we take pride in our open-architecture approach, seeking out best-in-class providers and solutions to deliver top-notch services. Affiliated with Dynasty Financial Partners, our firm benefits from institutional-level infrastructure and support, covering back-office operations, vendor due diligence, technology, compliance, and marketing.

Our commitment to a white-glove service model, higher fiduciary standards, and multi-jurisdictional capabilities set us apart. Notably, the +43% organic growth in advisory revenue we achieved from 2022 to 2023 reflects our adept navigation of the current financial landscape.

A key distinguishing factor and principal differentiator for Rose Capital Advisors lies in our unique value proposition, particularly for clients accustomed to conventional investment allocation strategies such as the ubiquitous 60/40 model. Our access to a diverse array of alternative investments makes us a bit different from other advisory firms. This strategy has proven highly attractive to Ultra-High-Net-Worth investors, including C-level executives from Fortune 500 companies, entrepreneurs, and high-profile professional athletes and entertainers. The appeal of our alternative investment platform is rooted in our ability to offer opportunities that are often under-allocated to or have limited accessibility through traditional advisory relationships.

Our success in attracting such high-profile clientele is a testament to our ability to provide a customized and diversified approach to investments, with the potential to result in enhanced risk-adjusted returns across both public and private markets. This capacity to deliver a unique investment experience reinforces Rose Capital Advisors' standing as a leader in innovative and tailored financial solutions, making us a deserving recipient of the awards in Family Office Services and Philanthropy.

The Family Office Services award underscores our dedication to exceeding expectations. Our high-touch service model goes beyond traditional wealth management, involving itself in our clients' lifestyle decisions and providing support in various aspects, from tax and legal coordination to fine art collection management.

On the philanthropic front, our commitment to community welfare is exemplified by Managing Partner Michael Rose's significant contributions and involvement sitting on boards and investment committees of several non-profits. We actively encourage our employees and clients to engage in charitable activities, with Head of Business Development Gareth Evans showcasing remarkable efforts, including extreme sports challenges and global fundraising initiatives.

In celebration of our 10-year anniversary, we pledged a substantial multi-year commitment to the Overtown Youth Center, emphasizing our dedication to financial literacy and bridging economic gaps in underprivileged areas. This holistic approach to financial well-being, coupled with our genuine commitment to philanthropy, establishes Rose Capital Advisors as a leader in the financial industry, embodying the values of excellence, integrity, and community impact.



Sophós Advisors

A leading global advisory group, offering bespoke and conflict-free insurance solutions.



Over 40 years of combined industry experience

We help our clients set up innovative, flexible, long term insurance strategies.

Based in Miami, we are an independent group integrating specialized life insurance solutions, property and casualty, and captive insurance programs.

Our mission is to provide families and business groups with the essential tools needed to address multifaceted risk management needs.

**2024
WINNER**



We are very excited to announce that this year, **Sophos Advisors** has been recognised in **The Miami Family Wealth Report Awards incorporating Latin America and the Caribbean 2024** in the following categories:

- INSURANCE OFFERING (CARIBBEAN) ▪ INSURANCE OFFERING (LATIN AMERICA)

Sophos Advisors Continue Global Expansion With Enduring Dedication



Alejandro Gil and Jorge Carstensen
Managing Partners
Sophos Advisors



Please explain why you think your firm has been able to achieve a high level of success?

Over the last 7 and a half years, we have consistently remained committed to our mission: to deliver tailored-made insurance solutions to our clients and to advocate for their needs and interests within the broader insurance sector. Moreover, we take pride in our distinctive value proposition, which transcends the protection of families' accumulated wealth to encompass safeguarding the fundamental engine of their success – their businesses. This enduring dedication underscores our commitment to serving our clients comprehensively, ensuring both their financial well-being and the security of the vital assets that drive their prosperity.

What challenges have you had to surmount to get to this point?

We offer services and solutions across the Americas, Europe, and Asia. Navigating the intricate regulatory frameworks in each region and leveraging them to benefit our clients presents a significant challenge. Furthermore, our industry is significantly shaped by the substantial influence exerted by our competitors. Their market strategies, innovations, and competitive edge all contribute to the dynamic landscape in which we operate, prompting us to continually adapt and excel to maintain our competitive position and offer greater value to our clients.

What has led to your firm's success and what role did your colleagues play?

The primary driver of success has the firm's co-founders expertise, knowledge, and vision coupled with a world-class network of professionals in the wealth and risk management industries with whom we work cases together. The key to success relies on bringing internal and external partners together for the benefit of our clients.

Explain what benefits your firm and colleagues get from these awards.

It is a recognition of our vision, dedication, innovation, and industry expertise. Receiving the *Family Wealth Report* Awards enhances our reputation and credibility with both institutional and private clients, further solidifying our standing in the industry.

Where in the world do you operate – are you mainly a domestic player or international?

Although headquartered in Miami, our primary focus extends beyond the U.S. market.

Sophos' partners have predominantly cultivated their professional growth through international business ventures, exemplifying our robust global competency. This emphasis on international experience underscores our unwavering commitment to serving clients worldwide and demonstrates our ability to navigate diverse global markets effectively, all while operating from our Miami base.

What are your ambitions for the business?

We are committed to broadening our footprint beyond the LATAM and Caribbean regions. Our global expansion journey commenced with the establishment of our presence in Zurich, Switzerland, in April 2023, and we are actively pursuing licensing in Dubai. These new offices significantly enhance our capacity to provide advisory services to High-Net-Worth (HNW) families throughout Europe, Middle, Africa and Central Asia, marking a pivotal step in our international growth strategy. Our dedication to serving clients in these diverse regions showcases our commitment to extending our global reach and expertise in the insurance industry.

THE FAMILY OFFICE DOCTOR



WHERE MONEY MEETS EMOTION

We work with families in an unconflicted manner, focused on the emotive elements, such as family meetings, governance, philanthropy, mission statements and value statements. All along ensuring a focus on good mental health for all those involved.



www.familyofficedr.com



enquires@familyofficedr.com

In Any Family Business, Emotion Is A Vital Currency



Samy Dwek

CEO

The Family Office Doctor LLC



I grew up in a family-owned business. Looking back, I was privileged. It gave me a unique perspective into the family dynamics that exist in such an environment. I wasn't only exposed to my family's environment, however, but to the unique emotional universes' families of other privately-owned businesses with their unique emotional universes. That exposure informs my approach to family business today.

Many children of entrepreneurs seek entrepreneurship themselves. Through opportunity and circumstance, my life took a different turn, and I ended up in finance. It was partially an active decision that I did not want to be in the family business. I mustered the courage to tell my father, and he had the wisdom to allow me to go and find my way.

What came next was a 26-year career in the global financial sector, with two decades with JP Morgan, including the creation of the firm's Family Office Solutions Unit. After working closely with high-net worth investors and family offices, I decided in 2019 to leave that world and create something new. That's where my upbringing impacted my future. I realized that many advisors focused on family business owners and family offices. However, in almost every case, their primary concern was either money management or tax and estate planning. No one focused on the emotional side of the enterprise.

My approach was White Knight Consulting, which carved out a niche serving a sector that had never been addressed serving and was rife with stigma. One of my biggest challenges in my chosen niche was explaining to people the benefit that such counsel can bring them and their families. They often suffered the emotional hurdles of family business but didn't consider that maybe, their emotions were not being accepted. They could be addressed.

"It was following an interview with publisher Tom Burroughes, where he coined me "The Family Office Doctor", that I rebranded my business to address head-on the concept of a practitioner helping diagnose and treat the emotional ills of today's family business."

So, how does one help a family deal with emotions? To be clear, I am not a medical professional nor a social worker. Yet, I am the married father of adult children successful in their own careers, and I have brought calm guidance to many families who have faced emotional challenges.

As a practice, we work with families to improve their communications, whether through family meetings or through more frequent and honest correspondence. We help them draft a family mission or value statement; craft the family governance documents; consult on the creation of a family office to align all members' intentions with those of the matriarch and patriarch; as well as audit of the family office to ensure all is operating as planned.

Since the creation of my business, I have counselled families from the U.S. and throughout the Americas, including Mexico and Panama, to the U.K., France, Switzerland, Italy, Malta, Saudi Arabia and Bahrain.

Our approach is to collaborate with the families to find solutions in an unbiased, non-conflicted manner. When difficulties stem from a member's mental health issues, we work to remove any stigma to work towards conflict resolution. Together, we build or rebuild bridges, help apply governance and guidance, and encourage a focus on a shared tomorrow.

We help clients across the thriving economies of the Americas get where they need to go to, with our compelling combination of passionate people-led service and investment in technology delivering first-rate, independent corporate, fiduciary, and fund services.

Contact us to discover how our multi-lingual Latin America team can make a difference to your business.

CLIENT DRIVEN FUTURE FOCUSED



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Simple Ambition Yields Success For Trident Trust



Andy Oliver
Regional Managing Director
Trident Trust



Established over 45 years ago and active in the United States and Caribbean since the mid-1980s, Trident Trust is a leading provider of fiduciary, corporate, and fund administration services, employing over 1,000 staff across a global footprint that spans Africa, the Americas, Asia, the Caribbean, Europe, and the Middle East.

Privately owned and independent, Trident Trust provides its services to high-net-worth families and family offices, leading financial institutions, professional advisors, and asset managers, who rely on our worldwide presence, technical knowledge, tailored solutions and our commitment to reliability, responsiveness, attention to detail and personal service.

What has led to your firm's success and what role did your colleagues play?

The historical growth of Trident Trust has been significantly organic, supplemented by a number of strategic acquisitions. Our continued success is firmly down to the commitment and entrepreneurship that our management teams and colleagues live every day. We are exceptionally proud of the collaborative culture of our Group that allows our teams to flourish.

In an increasingly complicated and global environment, Trident Trust continues to extend its jurisdictional footprint and add to its service offering. We treat every client on their own merits, spending time to understand their requirements and goals to establish and maintain bespoke structures, while investing in the personal relationships that are fundamental to long-term partnerships.

Our future success is firmly in the hands of our teams. We invest in both our junior staff, setting them on a career journey and supporting their technical and personal development, while recruiting specialist and experienced staff to enhance our teams and client delivery.

Explain what benefits your firm and colleagues get from these awards.

Industry awards demonstrate to our market and industry that we deliver an exceptional and highly valued service, and reconfirm to our teams that their loyalty and efforts are valued and respected. We celebrate as one should, a job well done, which we have only managed to accomplish with their collective efforts.

Having said that, we do not allow ourselves to rest on our laurels. Our service levels are judged by our clients every single day and we set ourselves incredibly high standards that we work hard to maintain.

How and in what ways do you measure success?

Other than financial performance, which is clearly a core tool to measure our ongoing success, our performance is tracked across other important metrics, such as:

- Size and range of our client portfolio.
- Length of relationship. Both clients and staff tenure.
- Follow-on new business. Clients continuing to utilize us for their future and changing needs.
- Referrals. Both clients and staff referring their contacts for services or roles.
- Lost clients and service issues. It is vital that we listen to all feedback, good and bad.

What are your ambitions for the business?

Our ambition is to continue to build a sustainable business environment and culture, while investing in our infrastructure and technology backbone so that our industry-leading professionals are able to provide our clients with the services and solutions to meet their changing goals and needs. We get this right and we will continue to grow and develop into the future.



WINNER: FigTree Financial



WINNER: Scotia Wealth Management



WINNER: EFG



WINNER: AITi Tiedemann Global

The Miami *Family Wealth Report* Awards incorporating Latin America and the Caribbean Winners 2024

WEALTH MANAGEMENT SERVICE CATEGORIES

**Digital Capability
(Latin America)**

WINNER

FIRST **1** RATE

**Family Office Solution
(Latin America)**

WINNER

FIRST **1** RATE

**Wealth Planning
Solution or Team
(Latin America)**

WINNER

FIRST **1** RATE

**Wealth Planning
Solution (Caribbean)**

WINNER


FIGTREE
FINANCIAL

**Family Office
Services (Caribbean)**

WINNER


FIGTREE
FINANCIAL

**Wealth Planning
Solution (Miami)**

WINNER

Scotia
Wealth Management.

**Team Servicing
UHNW Individuals
(Latin America)**

WINNER

EFG

**Portfolio
Management (Miami)**

WINNER

AITi | TIEDEMANN
GLOBAL

**Philanthropy
Advisory (Miami)**

WINNER

ROSE
CAPITAL ADVISORS

**Family Office
Services (Miami)**

WINNER

ROSE
CAPITAL ADVISORS



WINNER: Sophos Advisors



WINNER: The Family Office Doctor LLC



WINNER: Raúl Markos - Chicago Atlantic



WINNER: Rosa Nelly Trevinyo-Rodriguez - R.N. Trevinyo-Rodriguez & Asociados



WINNER: Trident Trust



SPECIALIST AND INDIVIDUAL CATEGORIES

*Insurance Offering
(Caribbean)*

WINNER



*Insurance Offering
(Latin America)*

WINNER



*Consultancy Firm
(Miami)*

WINNER



The Family Office Doctor

*Insurance Offering
(Miami)*

WINNER



*Female Executive
(Miami)*

WINNER

Andrea Dykes



*Rising Star Under
40 (Miami)*

WINNER

Raúl Markos



CHICAGOATLANTIC

*Outstanding Contribution
to Wealth Management Thought
Leadership (Individual) (Latin America)*

WINNER

Rosa Nelly
Trevinyo-Rodriguez



R.N. Trevinyo-Rodriguez
& Asociados
Consultoría e Investigación en Empresas Familiares

**PRIVATE CLIENT
CATEGORY**

*Trust Company
(Miami)*

WINNER





WINNER: Trident Trust



WINNER: Chicago Atlantic



WINNER: EFG



WINNER: EFG

OVERALL REGIONAL TECHNOLOGY CATEGORIES

WealthTech Solution (Caribbean) **WINNER**



WealthTech Solution (Latin America) **WINNER**



TEAM BASED CATEGORIES

Spanish-Portuguese Speaking Clients Team (Miami) **WINNER**



International Clients Team (Miami) **WINNER**



INDEPENDENT WEALTH MANAGERS CATEGORY

Alternatives Provider (Miami) **WINNER**



INVESTMENT MANAGEMENT CATEGORY

Asset Manager (Latin America) **WINNER**



PRIVATE BANKING CATEGORY

Best Overall Private Bank (Latin America) **WINNER**





ClearView

Financial Media

PUBLICATIONS

WealthBriefing

News Insight Intelligence

WealthBriefing is the leading subscription-based business intelligence service for the wealth management community, with the latest news, analysis and in-depth features from around the globe. *WealthBriefing* subscribers are part of an international community for whom staying abreast of the latest industry developments is a crucial part of their professional practice. Readers find our content on topics such as strategy, M&A, important people moves, investment management and asset allocation to be an essential resource in a fast-moving world.

WealthBriefingAsia

Global Perspective, Regional Focus

The Asia-Pacific region's meteoric rise as a major wealth management market has sparked huge demand for region-specific business information. *WealthBriefingAsia* was launched in 2009 to satisfy this growing information requirement, and it is the only wealth management news site focusing exclusively on the Asia-Pacific region. Providing indispensable news, features and industry views that are always relevant and concise, *WealthBriefingAsia* allows subscribers to conserve that most precious of all resources: time.

FAMILYWEALTHREPORT

North American Family Office Intelligence

The North American wealth management market is one of the largest and most diverse in the world, and is markedly different from those in Europe and the Asia-Pacific region. Multi and single family offices in particular are a well-entrenched, integral part of the private wealth management landscape. *Family Wealth Report* provides need to know business intelligence in a convenient and easy-to-read format – straight to subscribers' inboxes every day. Nowhere else will you find such high quality, in-depth and often exclusive content all in one place.



WEALTH MANAGEMENT AND PRIVATE CLIENT EVENTS AND AWARDS SERIES

A unique thought-leadership platform, *WealthBriefing's* events foster intellectual debate on the challenges and opportunities facing the industry and are designed to be an optimal use of wealth managers' precious time and present an excellent networking opportunity.

WealthBriefing has added to its offering for the global private banking and wealth management communities by running thirteen annual awards programmes for the family office, private banking, wealth management and private client communities. The awards programmes are focused around three main category groupings: experts (individuals and teams); products and services for wealth managers and clients, and institutions of all sizes and types

BESPOKE RESEARCH SERVICES

WealthBriefing has unrivalled access to the most senior wealth management professionals across the globe, meaning that our research reports represent guides to future best practice as much as being barometers of current industry trends.



GLOBAL AWARDS

Showcasing The Best in the Industry

Independence, integrity and genuine insight are the watchwords of the judging process.

2024 Announcements Schedule

18 JANUARY 2024

Miami Family Wealth Report Awards
incorporating Latin America & the Caribbean

8 & 22 FEBRUARY 2024

WealthBriefing Swiss Awards
WealthBriefing WealthTech Americas Awards

6 & 21 MARCH 2024

WealthBriefing Swiss EAM Awards
WealthBriefing European Awards

2 & 30 MAY 2024

Family Wealth Report Awards
WealthBriefing Asia & Greater China Awards

27 JUNE 2024

WealthBriefing Wealth For Good Awards

3 OCTOBER 2024

WealthBriefing Asia EAM Awards

21 NOVEMBER 2024

WealthBriefing MENA Awards

5 DECEMBER 2024

WealthBriefing Channel Islands Awards



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