

PAM Awards 2018 – Winners & Finalists

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Lifetime Achievement

Peter Stormonth Darling

Investment Performance – Cautious Portfolios

Winner: Investec Wealth & Investment

Finalists: Close Brothers Asset Management, Coutts, Greystone Wealth Management, Sanlam Private Wealth, Smith & Williamson Investment Management

Investment Performance – Defensive Portfolios

Winner: Smith & Williamson Investment Management

Finalists: Citi Private Bank, Close Brothers Asset Management, Rathbones, Rothschild Wealth Management

Investment Performance – Growth Portfolios

Winner: Veritas Investment Management

Finalists: Albert E Sharp, Greystone Wealth Management, James Hambro & Partners

Investment Performance – High Growth Portfolios

Winner: Sanlam Private Wealth

Finalists: Kleinwort Hambros, Stonehage Fleming Investment Management

Emerging Manager

Winner: Wren Investment Office

Finalists: Albert E Sharp, Lincoln Private Investment Office, Saranac Partners

Commended: Connor Broadley

Investment Product or Service Innovation

Winner: Tribe Impact Capital

Finalists: Insignis Cash

Digital Wealth Solution

Winner: Nutmeg

Finalists: Netwealth Investments, Scalable Capital

Commended: Insignis Cash

Quality & Clarity of Reporting – Non-Custodian

Winner: James Hambro & Partners

Finalists: Seven Investment Management, Smith & Williamson Investment Management, Standard Life Wealth

Commended: Capital Generation Partners, Stonehage Fleming Investment Management

Quality & Clarity of Reporting – Custodian

Winner: Sarasin & Partners

Finalists: Cazenove Capital, Citi Private Bank, Close Brothers Asset Management, Rothschild Wealth Management

Client Service Quality – High Net Worth

Winner: Cazenove Capital

Finalists: James Hambro & Partners, Rathbones, Sarasin & Partners, Smith & Williamson Investment Management

Client Service Quality – Ultra High Net Worth

Winner: Rothschild Wealth Management

Finalists: Capital Generation Partners, Cazenove Capital, Citi Private Bank, Stonehage Fleming Investment Management

Total Wealth Solutions Provider – High Net Worth

Winner: Coutts

Finalists: Cazenove Capital, Kleinwort Hambros, UBS Wealth Management

Total Wealth Solutions Provider – Ultra High Net Worth

Winner: Rothschild Wealth Management

Finalists: Citi Private Bank, Kleinwort Hambros, Stonehage Fleming Investment Management

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