EUROMONEY
GLOBAL PRIVATE BANKING AWARDS 2023

JUDGES PANEL

Helen Allingham, *Consultant*, Allingham Research

Helen is a highly-experienced financial services analyst. Formerly the head of wealth management at research house GlobalData, Helen brings over 20 years of experience in research and insight. At GlobalData, she was responsible for transforming and expanding a legacy proposition into a truly global offering covering all aspects of private banking and wealth management. Today, she is an independent research professional helping research houses, consultancies and marketing agencies to deliver analysis, insight and thought leadership in the financial services sector.

Farzad Billimoria. *Head of private banking*, HSBC

Farzad heads HSBC's private banking business in the UAE. He has lived and worked in Dubai over the last 18 years and comes with over 25 years (all with HSBC) of relevant experience in Private Banking, Retail banking, Wealth Management and Credit Cards. Is a current member of the HSBC Private Bank (Suisse)SA's MENA, HSBC Bank Middle East's UAE & HSBC Bank Middle East's Wealth and Personal Banking Executive Committees. Result orientated, with a strong track record of performance/ delivery in both growth and restructuring scenarios. Also leads and manages high performance teams successfully through both strategic vision and practical execution.

Highly driven by values and ethics, which have delivered business growth over the long-term and in the right way. Experienced in dealing with country regulators and running/ growing a compliant business, which includes setting up HSBC's Private Banks's offices and businesses in the DIFC, ADGM and now the onshore Private Bank.

Jessica Cutrera, *President*, Leo Wealth

Jessica is the President of Leo Wealth, a global wealth management firm. Jessica also serves on the firm's investment committee and as a Responsible Officer and the Compliance Officer in Hong Kong. She and her team specialize in providing comprehensive wealth management and estate and tax planning services to U.S. citizens expatriated to Asia and to persons with U.S. related planning needs. Jessica is a Trust and Estate Practitioner and has an MBA from Temple University Japan.

Pablo Figueroa, *Director Strategy Ultra High Net Worth Private Banking Mexico*, Banco Santander (Mexico)

Pablo Figueroa is an Executive Director and the Head of Investment Strategies for the UHNW Private Banking in Mexico. He leads the Investment Consultant Team and the ESG Champions Project in Mexico. Pablo is also responsible of the implementation of the open architecture for Structured Products, Mutual Funds and Independent Analysis within the local Private Banking. Pablo participates in the global Wealth management Investment Forums and was member of the team who developed The Future Wealth concept within Santander. He joined Santander in 2017. He previously held different Investment Strategy positions in Credit Suisse Mexico (2013-2017). Pablo holds a B.A. Financial Management (LAF), ITESM Campus Santa Fe, Mexico and a Certificate of Banking and Insurance, HESSO, Switzerland.

Dr Ruzhen Li, *Head of Advisory*, Enhance Group

Dr Li is the Head of Advisory at Enhance Group, an independent investment advisory and reporting firm headquartered in Jersey.

Dr Li has over 15 years of experience in researching investment managers to advise global families and fiduciaries on complex investment affairs. After the completion of her PhD, Dr Li started her professional career with Deloitte Private Client Services Limited and became a CFA Charter Holder. Before joining Enhance, Dr Li was the Head of Research and one of the founding members of LJ Athene Investment Advisory Ltd.

Tom McCullough, *Chairman and CEO*, Northwood Family Office

Tom McCullough is Chairman and CEO of Northwood Family Office, the leading Canadian multi-family office. He has spent over 35 years in the wealth management/family office field. Tom McCullough is Chairman and CEO of Northwood Family Office.

In 2003, this led Tom to start Northwood Family Office with partner Scott Hayman. Northwood Family Office has quickly become the leader in its field and has consistently been recognized as the '#1 Family Office in Canada' by Euromoney in its global private banking survey, and as 'the 'Best North American Family Office' (in the 'up to $2.5bln' AUM category) by the Family Wealth Report Awards.

Tom is a frequent speaker on issues relevant to families of wealth and is the co-author of *Wealth of Wisdom: The Top 50 Questions Wealthy Families Ask* and *Family Wealth Management: 7 Imperatives for Successful Investing in the New World Order* and *Wealth of Wisdom: Top Practices for Wealthy Families and Their Advisors*. He is an Adjunct Professor and Executive-in-Residence at the University of Toronto's Rotman School of Management MBA program. He is an Entrepreneur-in-Residence at Western University's Ivey School of Business and a member of the Editorial Board of the Journal of Wealth Management. He was recently awarded 'Best Individual Contribution to Thought Leadership in the Wealth Management Industry' by the 2020 Family Wealth Report Awards.

Olivier Paccalin, *Head of Wealth Management Solutions*, Societe Generale Private Banking

Olivier Paccalin began his career in 1998 at the Head Office of Société Générale Private Banking where he contributed to the creation of the Business Line.

In 2005 he joined SGPB France , in charge of the marketing of the Portfolio Management Solutions. In 2007 he developed the bank's Investment Consulting team, which consolidated the Advisory Managed activity in 2009. In 2011 he was appointed local head of Investment Solutions (now WMS) with additional responsibility for financing, life insurance and real estate before being appointed Chief Investment Officer for SGPB France in 2012.

In September 2015, he was appointed Head of Wealth Management Solutions for Societe Generale Private Banking and joined the Executive Committee of the private bank. In summer 2019, he extended his prerogatives by taking over the supervision of the Private Bankers activity in addition to investment solutions, as Head of Commercial and Solutions.

Olivier Paccalin is a graduate of the Paris Dauphine University, member of the SFAF and is a certified by the Certified International Investment Analysts.

Olivier Pagès, *Chief of Staff*, CMB Monaco

He is key in driving the strategic, operational, and cultural change the Principality's leading private bank has embarked on. A member of the Management Committee, he works on the company's top priorities, at its strategic core.

Olivier has over 15 years of experience in the Private Banking industry and in consulting firms, including at KPMG as Head of Financial Advisory Services and Barclays Wealth Management as Business Delivery & Control Lead for the EMEA region (Monaco, Switzerland, Dubaï).

A graduate from EDHEC Business School, Olivier has also been certified by Harvard Business School in Disruptive Strategy.

Rogerio Pessoa, *Partner, Head of Wealth Management*, BTG Pactual

Rogério Pessoa Cavalcanti de Albuquerque serves as the co-head of the wealth management unit and executive officer of Banco BTG Pactual. Mr. Pessoa joined Banco BTG Pactual in 1998 and became a partner in 2004. Mr. Pessoa served as head of our wealth management unit from 2004 to 2009. Previously, Mr. Pessoa worked for Delta Bank as vice president of private banking and for Prudential Securities as a broker in the international client accounts division. Mr. Pessoa received his bachelor's degree in economics from the Catholic University of Rio de Janeiro and his MBA from the University of Illinois.

Soumya Rajan, *Founder & CEO*, Waterfield Advisors Private Limited

Soumya Rajan is the founder of Waterfield Advisors, India's largest independent Multi Family Office and Wealth Advisory company and brings over 25 years of experience in financial services. At Waterfield, Soumya advises several of India's leading business families on their global investments, issues related to succession and the continuity of their family enterprise, corporate and family governance, business strategy and philanthropy. The company presently advises on global assets of ~US$4.3 bn and is one of the most awarded Wealth Management firms in the country. She was recently featured in the Forbes India Most Powerful Women List 2021 and is one of India's top 100 women professionals in Finance. She also serves on the Board of several non-profit organizations in the education and healthcare space. Soumya was awarded the Radhakrishnan Scholarship to study at Oxford University, U.K, where she completed her Masters in Mathematics and holds a B.A (Hons) in Mathematics from St. Stephen's College, Delhi.