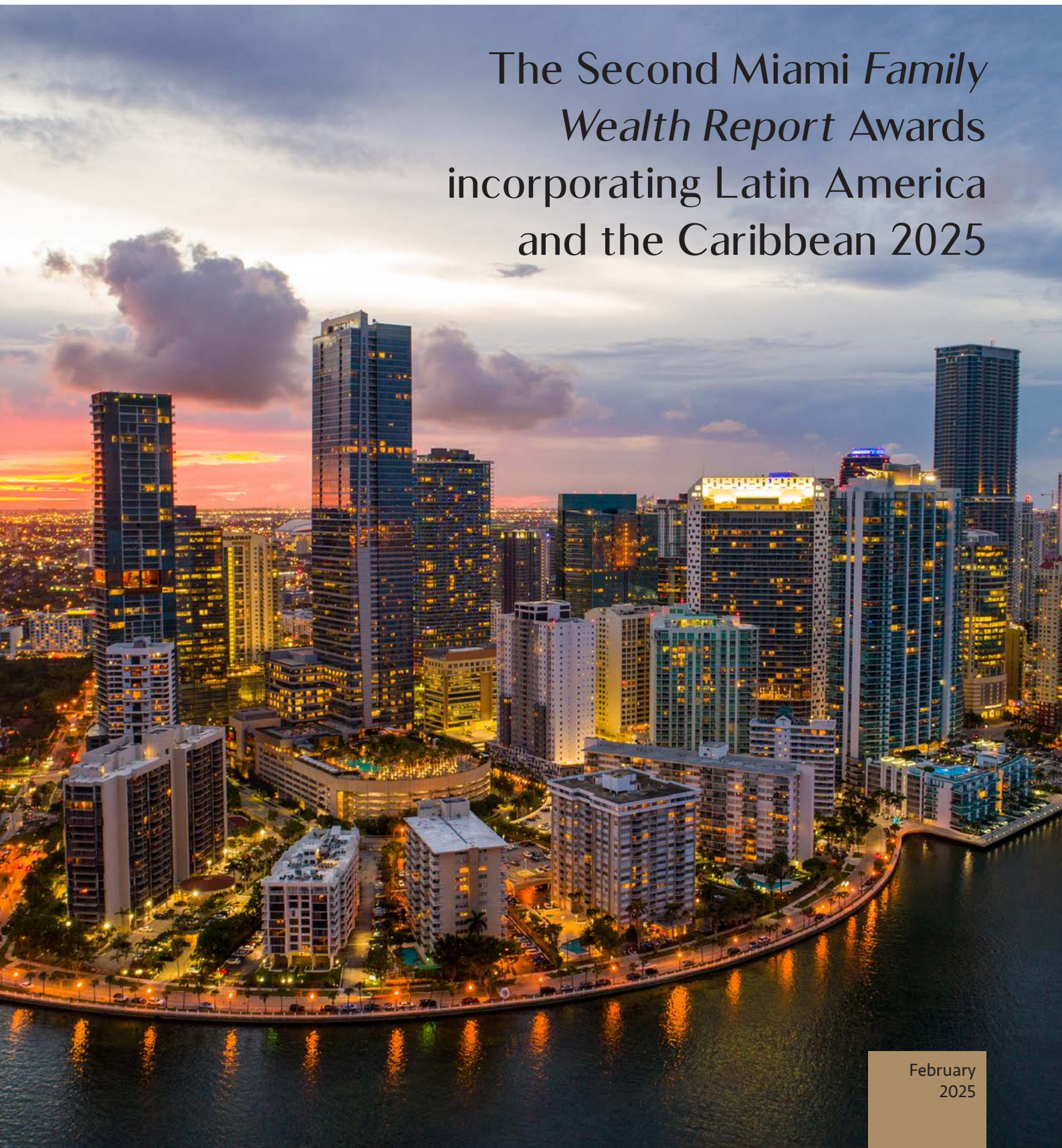




ACCLAIM

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

The Second *Miami Family*
Wealth Report Awards
incorporating Latin America
and the Caribbean 2025



February
2025

RECENT RESEARCH OUTPUT

FamilyWealthReport
North American Family Office Intelligence

WealthBriefing
News Insight Intelligence

Technology & Operations Trends in Wealth Management 2024 (in partnership with Alpha FMC)

This 12th edition of *WealthBriefing's* Technology & Operations Trends in Wealth Management report, created with Alpha FMC, provides a global overview of how digital transformation is reshaping the wealth management sector. Firms across various regions are leveraging technology to enhance operational efficiency and client experience, while navigating evolving client expectations, regulatory changes, and a complex economic environment.

Philanthropy Evolved: How High-Net-Worth Individuals are Redefining Giving, Ethics and Impact (in partnership with Jersey Finance)

Philanthropy is undergoing a profound transformation as high-net-worth (HNW) individuals redefine traditional notions of giving, ethics, and impact. This report delves into these shifts, offering a comprehensive analysis of emerging trends, generational influences, and the evolving dynamics between wealth, altruism, and social responsibility.

The Bahamas: A Complete and Compelling Choice (in partnership with The Bahamas Financial Services Board)

The Bahamas stands out as a premier destination for business, blending political stability,

innovative financial structures, and an exceptional lifestyle. This report offers an in-depth exploration of its unique advantages as a financial hub, from wealth planning tools to cutting-edge FinTech initiatives, alongside its unparalleled appeal for high-net-worth individuals and global investors.

External Asset Managers in Asia - New Directions for Rapidly-Expanding Sector (in partnership with UBS)

Our second 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.

Winning Women in MENA

(in partnership with First Abu Dhabi Bank)

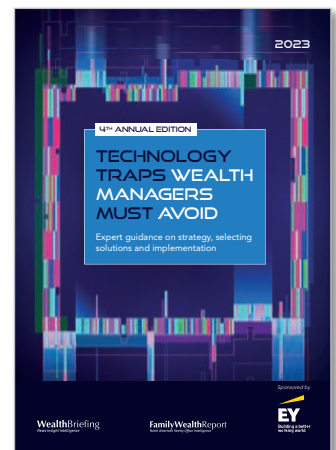
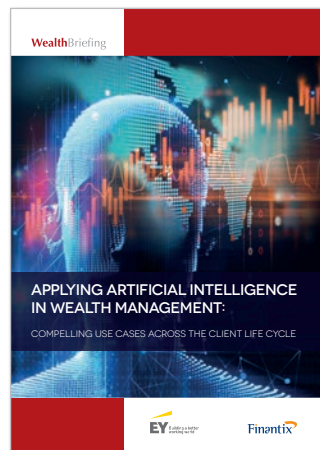
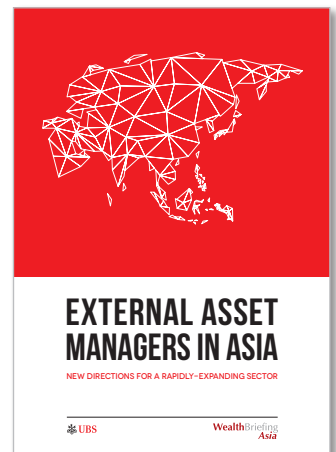
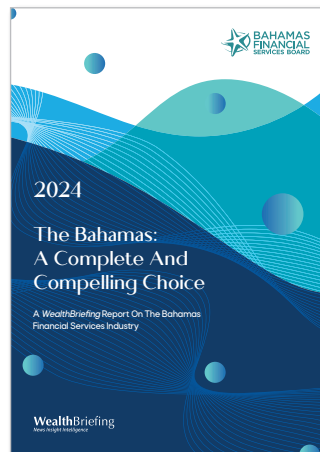
This ground breaking new research examines the growth of female entrepreneurship in the region. More specifically it looks at how women are driving family office strategy as well as the relationship between MENA's UHNW female clients and the wealth management industry.

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.

Technology Traps Wealth Managers Must Avoid (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.





Foreword

STEPHEN HARRIS
CEO, *Family Wealth Report*

The Miami *Family Wealth Report* Awards incorporating Latin America and the Caribbean, now in their second year, recognize excellence in these varied and rapidly changing areas and highlights the city's rightful place in the world's wealth management landscape.

The purpose of all ClearView's awards is to give the private client sector's movers and shakers the opportunity to demonstrate their pre-eminence to peers, clients and colleagues alike through a highly competitive process.

This program, in common with all others, gives participants the opportunity to benchmark themselves against their peers in the industry and to check their own performance, year on year.

The bedrock of each awards program is the judging process. Expert judges, drawn from across banking, the family office sector, consultancies, law firms and other relevant bodies, assess written submissions from entrants to select the winners in each of the categories. This process demands skill and expertise from the judging panel, along with a rigorously applied requirement for independence. We thank each of the judges for their time and effort in determining such a deserving group of winners.

We know how these awards are important for brand awareness, marketing, staff morale and a measure of success. After running the program of awards around the world for well over a decade, we know how much people value them. And finally, the organizers and team at *Family Wealth Report* relish the chance to meet so many participants in what's an enjoyable setting.

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OVERVIEW OF THE LATIN AMERICA AND CARIBBEAN SECTOR

To say that the region encompassing Miami, the Caribbean and Latin America-related market is varied is an understatement. The categories that *Family Wealth Report* has awarded this year reflect the range of service offerings across investment and asset management, legal, trust, tax, banking, wealth planning, family office services, not to mention wealth technology and the individual categories.

Miami, for example, is not just a home to home-grown wealth in Florida and other parts of the US southeast. It's also known as the capital of Latin America and as such is an important hub for wealthy individuals and their advisors from the region.

Similarly, its geographical proximity to the vibrant jurisdictions of the Caribbean makes the city a natural draw for business partners and talented individuals, those well versed in

dealing with clients in different languages, and internationally minded clientele who have made their home in the region for all or part of the year.

Statistics bear witness to the long potential being fulfilled. The Latin America wealth management market, measured in assets under management, is expected to reach \$1.36 trillion by 2030 from \$1.21 trillion in 2025 (source: *Mordor Intelligence*). Miami will undoubtedly benefit from this significant upswing.

As in every wealth management center of note, Miami boasts a mixture of international and local firms servicing the sophisticated and complex needs of their client base – from cross-border wealth structuring and philanthropy to investment management and trust services. What can be sure, though, is that Miami's unique stamp is always added to the business relationship.



MAISON BENJAMIN

LUXURY TRAVEL & LIFESTYLE MANAGEMENT
Solutions for family offices & wealth management firms

The Judging Panel

The Miami *Family Wealth Report* Awards incorporating Latin America and the Caribbean 2025 judging process was guided and assisted by a panel of independent experts, each of whom has been actively involved in the wealth management industry for many years and have an in-depth knowledge of the Latin American, Caribbean and Miami wealth management markets.



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



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



MIKE MCNAMARA
CEO
Baretz+Brunelle



JOSEPH W. REILLY JR
CEO and Founder
Circulus Group



CARLOS VALLADARES
Founder
Del Mar Capital, LLC



NARO ZIMMERMAN
Deputy Head of Caribbean
- Private Client Services
JTC



Join the movement.

The **Private Risk Management Association (PRMA)** is a nonprofit organization, comprised of over **5,000** dedicated risk management professionals committed to serving affluent families, individuals and their trusted advisors.

EDUCATION • NETWORKING • COLLABORATION • COMMUNITY



PRIVATERISKMANAGEMENT.ORG



What do you want your wealth to do for you?

Reveal new opportunities? Protect your family's future?
Finance your passions? No matter your goal, our proven
Active Wealth approach can help you achieve the life
you want to live and the legacy you wish to create.

To learn more, visit bny.com/activewealth



Supporting the World's Leading Wealth Creators



BNY Wealth

With tailored solutions designed to address complexities within legacy planning, asset protection and governance, BNY Wealth delivers unmatched value to family office leaders through exclusive services, such as next-generation education, onshore-offshore planning synergies and holistic wealth management.

"We form long-lasting relationships with the family office and the family through the continuity, collegiality and discretion of our team members." - Charles E. Long, Jr., Managing Director, Head of International Global Family Office, BNY Wealth

Meeting Complex Needs With a Multidisciplinary Approach

Our Cayman trust company, BNY Mellon Trust Company (Cayman) Limited, has longstanding, high-service relationships with many of the same families it has worked with since the early 1990s. BNY Wealth's multidisciplinary Active Wealth approach, which goes beyond simply establishing and administering fiduciary services, sets us apart from our peers, demonstrating a long-term commitment to helping distinguished family office professionals support clients who have made noteworthy contributions in education, health-care, tech, the arts and conservation. Through this approach, families have achieved legacy objectives related to investing, growing and safeguarding assets, tax management, wealth transfer goals and educating the next generation.

Boutique-like Solutions Backed by Safety, Stability and Scale

While we are uniquely positioned to deliver boutique-like, customized solutions built exclusively to advance the goals of our clients, we also have the strength and resources of a large firm. With the support of BNY, the world's largest global custodian, with over \$52 trillion in assets under custody and/or administration*, we have been serving family offices for over 50 years and currently

work with more than 300 family office clients across the globe. Our award-winning global family office practice evolved from supporting the financial, industrial and philanthropic interests of the Mellon Family, whose wealth dates back to the industrial revolution.

Unparalleled Support Through High-Quality Resources and Expertise

We provide family offices with solutions that address all aspects of their clients' wealth. Not only is this possible through exclusive networking access, but BNY Wealth's resources, spanning world-class investment management offerings and banking services, allow it to deliver unparalleled support. This includes strategies from asset managers around the world, outsourced CIO solutions, secured and unsecured lending, commercial real estate financing and fiduciary services, such as trust administration and maintenance. Our family office partners have found particular value in our next-generation educational programs, onshore and off-shore planning services, and guidance we provide on investments, cybersecurity and lifestyle planning.

The Importance of Community and the Continuity of Impact

BNY Wealth humbly accepts this recognition for the Miami, Latin America, and Caribbean Family Wealth Report Awards. It serves as a testament to our unwavering dedication to our clients, and the communities we are privileged to help them build through their indispensable contributions. At BNY Wealth, we have a unique perspective on the complex needs of wealthy families and family office teams. We facilitate opportunities for family office executives to network at client conferences, through sponsorship of industry organizations and through introductions to other family offices. Our goal is to continue helping family office leaders create superior outcomes for the families they serve, adapting and innovating as needed to address any challenges.

* As of December 31, 2024



FIERCELY INDEPENDENT

South Dakota's oldest and largest independent trust company, prioritizing client goals—not institutional agendas.

PASSIONATELY INNOVATIVE

Leveraging South Dakota's modern trust laws to empower clients with flexibility and unmatched direction and control.

Bridgeford redefines trust services with a conflict-free, non-institutional, client-centric approach, disrupting the traditional fiduciary service paradigm to create new possibilities in the planning process.

Visit **bridgefordtrust.com** to learn more.

Bridgeford Trust Company: Big Enough to Matter, Small Enough to Care



David Warren
Co-Founder & Chairman
Bridgeford Trust Company

What was the winning formula of your firm that explains why you won?

Bridgeford's winning formula lies in re-defining trust services with a conflict-free, non-institutional, client-centric approach, disrupting the traditional fiduciary service paradigm to create new possibilities in the planning process. As South Dakota's oldest and largest independently owned trust company, we have built our reputation on leveraging the state's powerful modern trust laws to offer unmatched direction, control, and flexibility to clients and their advisors. Our commitment to remaining conflict-free ensures that every decision we make prioritizes clients' needs rather than institutional agendas.

Please describe how your colleagues made a difference?

Bridgeford's success is built on the expertise, dedication, and collaborative spirit of our team. With over 140 years of combined legal, accounting, and trust administration experience, our colleagues bring a depth of knowledge that enable us to provide sophisticated trust solutions tailored to the specific needs of ultra-high-net-worth families and family offices.

Our collective entrepreneurial mindset drives a culture of innovation and adaptability, empowering our team to stay ahead in an ever-evolving industry while finding creative ways to address clients' unique needs. This forward-thinking approach, combined with our team's commitment to excellence, has solidified our reputation as a trusted partner in the fiduciary space and allows us to deliver the highest standards of service to families and their advisors.

What are you going to do to remain competitive and stay ahead?

To remain competitive, Bridgeford will continue to innovate and expand our capabilities, leveraging South Dakota's cutting-edge modern trust laws to stay at the forefront of the industry. In addition, our unwavering commitment to independence allows us to provide conflict-free services tailored to families and advisors worldwide.

We are also focused on expanding our

global presence through Bridgeford's Family of Companies, including Bridgeford Global, Bridgeford Advisors, and Bridgeford Services. Together, these entities enhance our ability to deliver specialized solutions, such as global trust planning, offshore fiduciary services, and sophisticated insurance strategies.

With our combined capabilities, we will continue to offer comprehensive, forward-looking solutions that evolve with the needs of clients in an ever-changing landscape.

Where do you see the wealth management industry and your part of it going in the next five years?

The wealth management industry has already undergone a paradigm shift, marked by a demand for sophisticated, client-centric solutions that prioritize independence, privacy, and control. This shift will only continue to accelerate, fueled by advances in modern trust law, increasing regulatory scrutiny, and the growing expectations of ultra-high-net-worth families and family offices.

This transformation is reshaping the trust industry, moving away from traditional, institutionalized approaches, and creating opportunities for independent, boutique-style trust companies. Families now expect not only progressive tax planning, asset protection, and privacy solutions but also conflict-free services that empower them to maintain control over their wealth.

Bridgeford will continue to lead in this evolving landscape by leveraging South Dakota's powerful modern trust laws, which set the standard for fiduciary planning worldwide. Our fiercely independent, non-institutionalized approach allows us to provide personalized fiduciary services that align with the unique goals of families. By remaining free from the influence of private equity and large institutional conglomerates, we preserve the flexibility, creativity, and client-first focus that define the new paradigm. As the industry becomes increasingly competitive, we are committed to being "Big Enough to Matter, Small Enough to Care."



Winner

• **Trust Company**



CAYSIDE PARTNERS



Family **Wealth** Report
AWARDS 2025

MIAMI, LATIN AMERICA & CARIBBEAN

WINNER

Investment Management Team - Miami

Cayside Partners



Family **Wealth** Report
AWARDS 2025

MIAMI, LATIN AMERICA & CARIBBEAN

WINNER

Next Generation Program - Miami

Cayside Partners

Florida-based Multi-family Office and Investment Firm Redefining the Client Experience



Todger Strunk, TJ Strunk & Colin Hickey
(left to right)
Founding Partners
Cayside Partners



Winner



- **Next Generation Program - Miami**
- **Investment Management Team - Miami**

Founded in Jupiter, FL, Cayside Partners is a multi-family office and independent advisor to a diverse group of families who have specific situations but similar long-term investment horizons. Ultimately, the firm provides a tailored approach to creating solutions for each of their unique clients.

What was the winning formula for your firm and how you won?

Cayside Partners' winning formula relies on our client-centric approach that combines alignment, independence and accessibility. These attributes with our forward-thinking style to investment management and portfolio construction has led to a great experience for our families. We address the limitations of traditional wealth management by offering highly customized solutions that encompass everything from investment strategies to lifestyle management. Our unbiased and flexible methodology ensures complete alignment with our clients' needs and goals. Our three founding partners have notable experiences in the investment industry and managing capital for families, while also taking pride in a more modern approach to relate with the next generation.

Alignment fosters trust. At Cayside, we prioritize relationships where success is mutual, serving as long-term trusted advisors for our clients and their families.

Independence sets us apart. Free from external incentives, we prioritize objective, conflict-free advice, leveraging cutting-edge technology and a global network of top-tier partners. This allows us to offer investment opportunities and platforms that are often not available to many firms.

Accessibility defines our service. As a boutique firm, we deliver the personalized attention high-performing families deserve.

How will you remain competitive and stay ahead of the competition?

Cayside Partners will remain at the forefront of the wealth

management industry by focusing on our clients and their needs, sourcing and building on our unique investment opportunities, leveraging financial technology and partnering with the highest-caliber service providers to deliver exceptional value to our clients.

Our commitment to "wealth tech" and cybersecurity ensures that we stay ahead in a rapidly evolving industry for our clients. We utilize tools to deliver real-time reporting, consolidated portfolio insights, and interactive dashboards, empowering clients with a comprehensive view of their financial landscape.

By continuously investing in technology and our business, leveraging our Florida-based network and global industry connections, and maintaining a steadfast commitment to client success, Cayside Partners is well-positioned to lead the future of wealth management.

Who inspires you, either inside or outside your organization?

At Cayside Partners, inspiration comes from both within and outside the organization. Internally, our team is motivated by the families we serve. Their trust in us to manage their wealth and navigate their family's futures inspires us to deliver excellence every day. We are driven by their unique stories of entrepreneurship, resilience, and commitment to building legacies for future generations. Their success and determination push us to continuously innovate and elevate our standards.

We have developed an advisory board of thought leaders, accomplished investors, and innovators across our industry who regularly provide expertise, guidance and insights into the opportunities and risks in the world, capital markets and our business at Cayside Partners.

Ultimately, we are inspired to build **enduring partnerships** that empower families to achieve their financial aspirations with confidence, clarity, and purpose. By aligning our success with our clients, we look to create a successful and long-standing financial journey together over many generations.



A US JOINT VENTURE WITH  Willow Street

Crestbridge Fiduciary offers clients a forward-thinking approach to protecting and structuring wealth. Bringing together leading trust and fiduciary service providers Crestbridge Family Office Services and Willow Street, Crestbridge Fiduciary is independent and focuses exclusively on trustee services.

Client families benefit from seamless relationship management across three jurisdictions: Wyoming, Jersey, and the Cayman Islands.

Our offerings include corporate trustee services and private trust company advisory, governance, and administration.



MIAMI, LATIN AMERICA & CARIBBEAN

WINNER

Independent Trust Firm - Latin America

Crestbridge Fiduciary



Darrell King
darrell.king@crestfos.com



Betty Andrikopoulos
betty@willowstreetgroup.com



Heather Tibbo
heather.tibbo@crestfos.com

Crestbridge Fiduciary: Empowering Families with Global Expertise, Tailored Solutions and Unmatched Client Focus



Darrell King
Managing Director, Americas
Crestbridge Fiduciary



Crestbridge Fiduciary brings client families the benefit of two preeminent firms: Crestbridge Family Office Services, a leading Jersey, Channel Islands-based trustee and fiduciary and Willow Street, a leading Wyoming-based trustee and fiduciary. Through Crestbridge Fiduciary, families with existing or planned US-based connections can access a comprehensive and sophisticated global platform for protecting and structuring wealth.

What was the winning formula of your firm/you that explains why you won?

We believe our key difference is our people, and the close cultural alignment between the two firms behind Crestbridge Fiduciary. With the right team, and with each member in the right role, we are nimble, responsive, and wholly client-focused in whatever location we are in, delivering first-class technical expertise, and backed up by extensive in-depth experience. We also recognize the value of active and attentive listening, to truly understand our clients' needs, the essential role of clear, timely communication, and the importance of efficient turnaround. We can offer this highly tailored service because we are an independent provider, which, as we have learned, is a significant consideration for our clients and partners.

What are you going to do to remain competitive and stay ahead?

With increasing global uncertainty, our independent ownership will ensure we can continue to assess opportunities and risks swiftly, with balance and objectivity, acting quickly and decisively. We encourage a culture of continuous improvement among our team, paying careful attention to evolving client needs, and ensuring that these are identified, pre-empted, and effectively addressed. We also continue to harness new technology to enhance our efficiency, accuracy, and data security, and increase the flexibility we offer to clients.

We will remain committed wholly and exclusively to excellence in the delivery of fiduciary services. Our clients consider us part of their overall provider team, offering a specialized set of capabilities, with

expertise that can integrate seamlessly with their other providers to help achieve shared objectives.

What sort of challenges did you surmount to reach this level and how have you been able to succeed in such fast-moving circumstances?

We have, of course, faced similar challenges to other providers in this space, caused by the constantly shifting geopolitical climate. The difference lies in how our structure and culture have helped us cushion the impact of this disruption on our clients. With our team's vast industry experience comes a notably far-sighted perspective on regional and global events, and the prescience quickly to assess and respond to change. This, coupled with the more fluid operating model, has helped us to minimize impact on our clients, and quickly explore emerging opportunities. We have always placed service at the heart of our offering which, along with the ability to offer customized solutions supported by flexible and transparent pricing, have been central to our success.

Where do you see the wealth management industry and your part of it going in the next five years?

The overall trend at a service provider level is for further industry consolidation in the US market. However, with wealthy families becoming increasingly mobile and seeking investment and business opportunities outside their home borders and in niche sectors, the demand for tailored, independent trustee and specialist fiduciary support will become highly sought after.

In addition, with the transfer of substantial wealth to the rising generation well underway, well-established, embedded and long-term relationships between families and their service providers will become even more important. It's a trend that is increasing the need for structures and for the skills and judgment of experienced providers who understand how best to establish and administer them, while supporting families' needs for asset preservation, diversification, and wealth transfer. We believe we are ideally positioned to address this growing need.



Excellence Recognized.

Day Pitney proudly celebrates being named a 2025 Family Wealth Report Awards winner in three categories:

Lawyer or Legal Counsel (Individual) – Latin America
Lawyer or Legal Counsel (Individual) – Miami
Legal Practice – Miami



This achievement reflects our commitment to excellence and leadership in serving family offices and advisors.

DAY PITNEY LLP

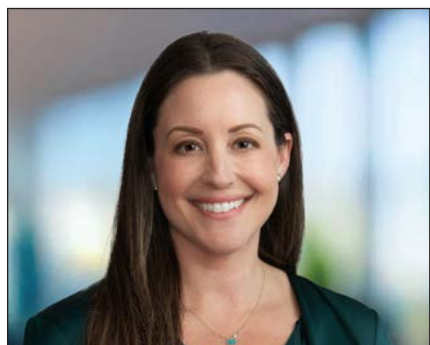
Boston | Connecticut | Florida | New Jersey | New York | Providence | Washington, DC
daypitney.com

No aspect of this advertisement has been approved by the highest court of any state. Prior results do not guarantee a similar outcome.

Delivering Excellence Across Generations and Borders



Daniel DiazLeyva - Chair,
LATAM Practice
Sarah Jacobson - Partner,
International Trusts
& Estates Practice
Day Pitney LLP



What was the winning formula of your firm that explains why you won?

Day Pitney, a full-service law firm with 300+ attorneys across the East Coast, offers a comprehensive range of legal services tailored to high-net-worth individuals, families, and family-owned enterprises. Our commitment to delivering personalized, high-caliber service sets us apart. Clients worldwide, including families from Latin America, trust us to address their unique needs, whether they're expanding into the U.S. market, re-domiciling, or navigating cross-border complexities.

We bring deep experience in wealth planning, including the preservation and tax-efficient transfer of wealth, probate and trust litigation, advice to institutional fiduciaries, business succession planning, and the administration of complex estates and trusts.

Please describe how your colleagues made a difference?

Our South Florida attorneys exemplify the firm's dedication to delivering concierge-style service combined with the resources of a national practice. They focus on trusts and estates, tax planning, real estate transactions, and family office structuring, creating strategies to protect and grow family legacies.

Their impact is particularly significant for Latin American families relocating to South Florida. We excel at addressing cross-border tax and estate planning challenges, coordinating with advisors in clients' home countries to deliver integrated, strategic solutions. Whether assisting long-time Florida residents with liquidity events or helping Latin American families establish secure futures, our South Florida team consistently delivers sophisticated, personalized counsel.

Through thought leadership initiatives like the Palm Beach Family Office Forum, our colleagues foster meaningful connections while providing high-net-worth individuals with insights to navigate today's complex legal and financial landscape.

Their dedication makes them invaluable advisors across borders and generations.

What are you going to do to remain competitive and stay ahead?

Day Pitney provides exceptional service by leveraging our deep bench of attorneys and multidisciplinary experience in private equity, mergers and acquisitions, investment management, fund formation, real estate, employment law, trusts and estates, and litigation. This holistic approach ensures we meet the full spectrum of client needs with innovative, forward-thinking solutions.

We remain leaders in emerging issues, including data privacy, cybersecurity, and global wealth planning. Our attorneys are particularly skilled in advising international families, especially from Latin America, the UK, India, Canada, and the Caribbean, on inbound investment into the U.S. and the accompanying tax and planning considerations.

To stay ahead, we will continue hosting exclusive events like the Palm Beach Family Office Forum and Business Owner Summits, providing high-net-worth families and advisors with critical insights and unparalleled networking opportunities.

How do you hope your firm will benefit from getting this award?

This award reinforces the values that have earned Day Pitney its reputation as a trusted partner to high-net-worth individuals and families worldwide. It highlights our ability to deliver exceptional service and build enduring relationships with our clients, supporting them across generations.

We hope the recognition will inspire our team to continue striving for excellence, further solidify our role as leaders in wealth planning and family advisory services, and showcase our unique ability to support Latin American families and others navigating complex legal and financial transitions.



Winner

- **Legal Practice - Miami**
- **Lawyer or Legal Counsel - Miami**
- **Lawyer or Legal Counsel (Individual) - Latin America**



For those who *think further.*

Discover how our entrepreneurial approach to wealth management delivers winning results.

We are delighted to have been named “Best Investment platform – Latin America” and “Best Team Servicing UHNW individuals – Latin America” in the Family Wealth Report Awards 2025.



EFG Wealth Management

efginternational.com

EFG International's global wealth management network operates in more than 40 locations worldwide. 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.

Entrepreneurial Thinking Meets Wealth Management



Sanjin Mohorovic
Head of EFG's Latin America Region
EFG Capital International



Winner

- **Investment Platform - Latin America**
- **Team Servicing UHNW Individuals - Latin America**

What was the winning formula of your firm?

EFG has a presence in major financial centres and growth markets. We serve clients in over 40 locations, offering them wealth management 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 wealth management 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.

Please describe how your colleagues made a difference?

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 firm 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

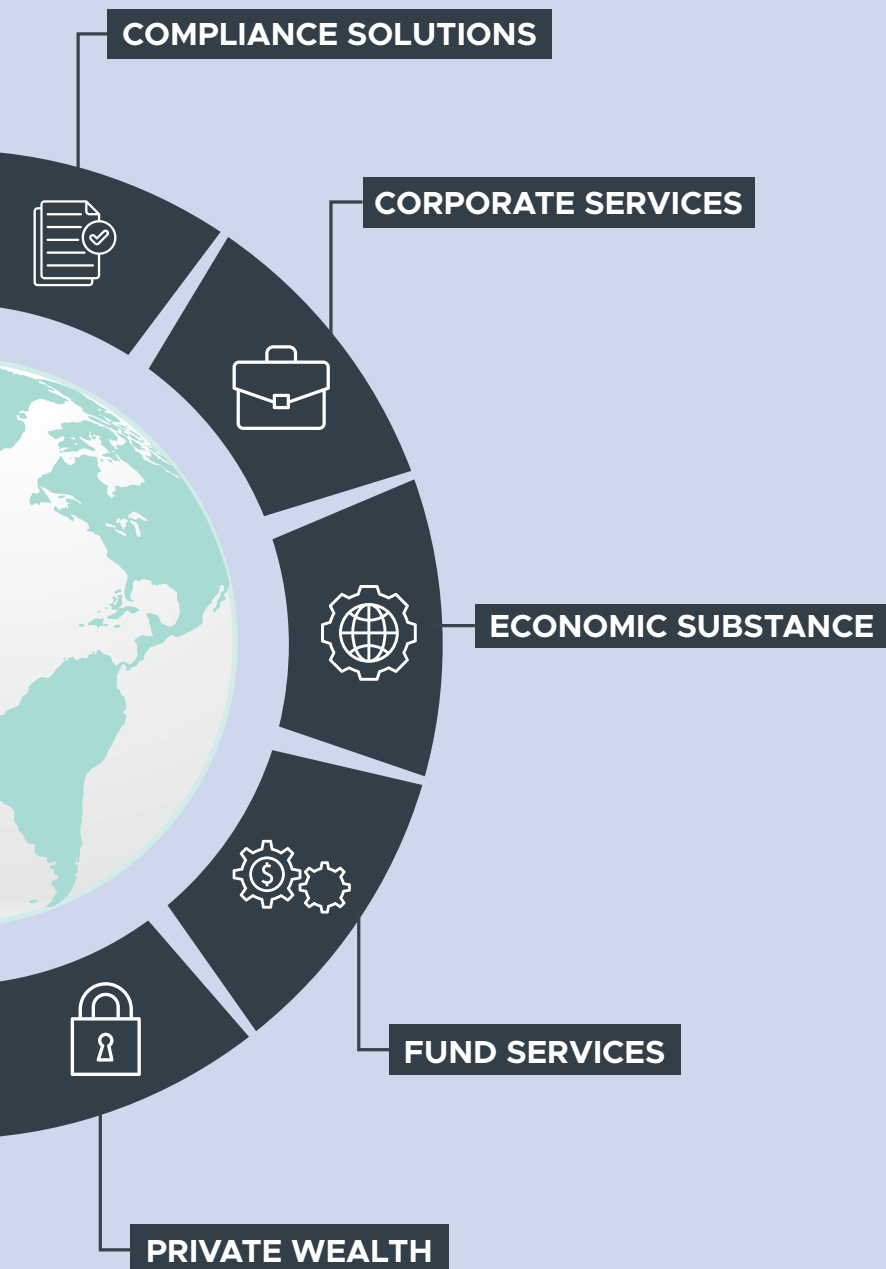
Switzerland, the Bahamas and the Cayman Islands. EFG is one of the few global private banks to offer a comprehensive range of wealth management, US broker-dealer and custody services to private clients and Independent Asset Managers in Latin America.

What are your ambitions for the business?

We have now reached the last year of our 2023-2025 strategic cycle. EFG is in a strong position to continue to consistently and successfully execute its strategy and to create value for our clients and all other stakeholders. 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 opening of an investment advisory office in Panama City. Finally, other areas of strategic focus include the digital acceleration. We will accelerate the deployment of our digital capabilities to improve the experience of our clients, our client relationship officers and enable all our colleagues to provide world-class service in an efficient manner.



Harneys Fiduciary is an independent provider of corporate, funds and trust services operating from key global offshore and onshore locations.



**Wherever you are, we speak
your language and work
in your time zone.**

British Virgin Islands | Cayman Islands
Cyprus | Hong Kong | London
Miami | Montevideo | São Paulo
Singapore | Shanghai

harneysfiduciary.com

50 years
HARNEYS
FIDUCIARY

Half a Century of Business Reaching New Heights



Ross Munro
CEO
Harneys Fiduciary



Harneys Fiduciary is an independent provider of corporate, funds and trust services operating from ten key global offshore and onshore locations. With over 300 employees, Harneys Fiduciary specialises in delivering bespoke solutions to private clients, corporate entities, and institutional investors.

What sort of challenges did you surmount to reach this level, and how have you succeeded in such fast-moving circumstances?

The past few years have brought their share of challenges, from adapting to evolving regulatory landscapes to navigating global economic shifts. One of the most defining moments for us was the separation from Harneys law firm, a strategic decision that allowed us to operate as an independent business. This move sharpened our focus, enhanced our agility, and positioned us to serve clients more effectively. Throughout the transition, our priority was clear: ensure continuity, uphold the high standards our clients expect, and preserve the relationships that are the cornerstone of our success. Adding to the significance of the year, we celebrated our 50th anniversary, where we reflected on our legacy while setting our sights firmly on the future.

Thriving in a dynamic environment comes down to two key principles: staying ahead of change and creating a culture that fosters innovation. For us, challenges aren't roadblocks, they are opportunities. This mindset has driven our success for five decades and will continue to shape our journey forward.

What are you going to do to remain competitive and stay ahead?

Staying competitive requires a dual focus on innovation and building strong client relationships. We're committed to investing in technology to streamline our operations and deliver a seamless, high-quality client experience. At the same time, we're continuously refining and expanding our service offerings to deliver forward-thinking solutions that align with our clients' evolving needs.

Equally important is the development of our people. By fostering a culture of continuous learning and adaptability, we're equipping our teams to stay ahead of industry trends and confidently address new challenges. It's this combination of innovation, tailored solutions, and a strong agile team that keeps us moving forward and delivering value to our clients.

What was the winning formula of your firm that explains why you won?

I believe our winning formula comes down to putting our clients first, a principle we've honed over 50 years in the industry. By truly understanding their needs, we've been able to combine technical expertise with a sharp understanding of the global markets we operate in, to deliver solutions that set us apart. We've also invested in technology to ensure our services are seamless, efficient, and ready to meet the demands of an ever-evolving regulatory landscape. But at the heart of everything we do is our culture, built on trust, collaboration, and innovation. It's this culture that empowers our team to adapt, rise to challenges, and continue delivering results for our clients.

Please describe how your colleagues made a difference.









Our people are the foundation of everything we've achieved at Harneys Fiduciary. It's their expertise, commitment to excellence, and passion for what they do that set us apart. I'm particularly proud that some of our team members have been with us for over 35 years, a testament to the culture we've built and the sense of purpose we share. Whether it's solving complex client challenges or driving innovation in our services, every individual contributes to our success. One of our greatest strengths is the way our teams collaborate across jurisdictions, working together to deliver a seamless global service. This spirit of teamwork and dedication is what keeps us ahead of the curve.



U.S. Trust Services

We bring together that rare combination of global expertise with a deep understanding of the needs of our clients. We operate from two of the nation's top jurisdictions, South Dakota and New Hampshire.

Our asset administration expertise includes:

- | | |
|---|--|
|  Liquid securities |  Hedge funds |
|  Private equity |  Private company shares |
|  Art |  Real estate |
|  Concentrated stock positions |  Domestic and foreign holding entities |

Key facts and figures*

People worldwide	Worldwide locations	Assets under administration	Minimum senior team experience	Funds under administration
5800⁺	25	\$750⁺ bn	20_{yrs}	800⁺

*Correct as of January 2025

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A Team-Based Approach To Multi-Generational Wealth Planning



Chip Martin
President, Private Wealth, U.S.
IQ-EQ



Winner

- **Domestic US Clients Team - Miami**
- **Trust Administration - Miami**
- **Outstanding Female Executive - Latin America**

IQ-EQ is a leading global investor services group. Our business is divided into three key service segments: Private & Institutional Asset Owners; Fund & Asset Managers; Debt, Capital Markets & Corporate. We employ 5,800+ people across 25 jurisdictions worldwide.

In the wealth sphere, IQ-EQ is uniquely positioned to deliver a suite of asset services tailored to both institutional and private asset owners. We ensure that asset protection, tax planning and succession needs are met through compliant administration of trusts, foundations and various types of holding companies.

IQ-EQ has private client offices that service trusts and related asset structures in over a dozen different countries. In the U.S., our servicing offices are in South Dakota and New Hampshire – two of the country's leading trust law and trust tax jurisdictions.

Please describe how your colleagues made a difference?

At IQ-EQ, we believe in the power of duality - valuing both IQ and EQ is key for our people, our clients and our business. Not only is our team equipped with expert knowledge and first-hand experience, but we engage on a personal level with our clients to truly understand their needs.

It's this combination of intellectual and emotional intelligence that truly makes a difference. Our global teams are committed to delivering the highest level of personalized service to our clients by building relationships that balance the professional with the personal.

What was the winning formula of your firm/you that explains why you won?

We attribute our success to the combination of our people and our approach to trust services. Our people are at the core of what we do, and our success is a direct result of hardworking and dedicated team members that share a common goal – to

provide consistent, reliable and customized support to our clients. Our unbundled services approach, our global reach coupled with local expertise, and our fee structure supports a collaborative, team-based approach to multi-generational wealth planning, which we believe sets us apart from other providers.

Where do you see the wealth management industry and your part of it going in the next five years?

The wealth management industry is continuously evolving as we prepare for one of the largest generational wealth transfers in history. The younger generations that are set to receive trillions worth of assets in the years ahead have significantly different investment goals and strategies than older generations.

We expect to see an increased emphasis on alternative asset classes owned within trust structures, as well as continued movement to non-proprietary investment platforms and portfolios.

Our team has extensive experience administering both traditional and non-traditional assets in trust, and we aim to provide families with the flexibility and best in class service across multiple asset classes that they seek, which isn't always available from a one-stop shop platform or provider.

How do you hope your firm will benefit from getting this award?

Winning these awards is truly an honor for us and is a testament to our team's ongoing commitment to excellence and high-quality service.

We're confident that this award will add value to our brand and further establish us as leaders within the industry.



Let's redefine what's possible

Plan | Evolve | Protect

São Paulo – Genève – Vilnius



FamilyWealthReport
AWARDS2025

MIAMI, LATIN AMERICA & CARIBBEAN

WINNER

Wealth Planning Solution or Team - Latin America

Millésime Private

Let's Redefine What's Possible: A Boutique Wealth Planning Firm With Purpose



Ruta Savignac, CFP®
Founder - Exclusive Advisor
Millésime Private Office

What was the winning formula of your firm that explains why you won?

Millésime Private Office stands apart as a premier approach dedicated to delivering highly personalized, forward-looking wealth solutions aligned with the unique lifestyles and ambitions of next-gen clients.

Our commitment is to reshape wealth management through an innovative, client-centered approach addressing the evolving needs of a new generation with precision and care. We serve young entrepreneurs, artists, and independent professionals seeking someone who understands, accepts, and supports their distinct lifestyle. They require an integrated approach that weaves together wealth growth and lifestyle management.

As wealth architects, we design and implement solutions that safeguard and grow wealth while resonating with clients' values, passions, and long-term visions. This customized approach maximizes tax efficiency and asset protection while embracing global opportunities.

Millésime is also committed to redefining the role of women in wealth management through our "Millésime Woman" initiative, which empowers women with the knowledge and tools to confidently manage their financial futures.

What are you going to do to remain competitive and stay ahead?

At Millésime, we developed a platform to deliver solutions and resolve issues. Throughout the process, we stay on our client's side—always. We blend tradition with innovation to create solutions that truly resonate with next-gen clients. By combining personalized wealth planning with the opportunity to participate in a broader purpose—like empowering women and future leaders—we are redefining wealth management. Staying ahead means being authentic, adapting to changing needs, and continuing to offer a modern, meaningful approach beyond just managing wealth.

What sort of challenges did you surmount to reach this level and how have you been able to succeed in such fast-moving circumstances?

We believe in simplification. The biggest challenge has been delivering innovative solutions in an industry rooted in tradition. We have worked hard to break the mold by blending family office services with a focus on empowering women and next-gen investors. Staying agile, embracing change, and keeping a strong connection with clients have been key to navigating this fast-paced environment and making a real impact.

Who inspires you, either inside or outside your organization?

We are constantly inspired by our clients—their ambition, creativity, and drive to make a meaningful impact. Externally, we look up to visionary leaders who push boundaries, challenge old ways of thinking, and redefine what's possible in wealth management.

How do you hope your firm will benefit from getting this award?

We are grateful for this recognition—it validates our fresh, innovative approach to wealth planning. By blending the best aspects of a family office structure with a broader purpose, we are redefining client service. This award reinforces that our vision resonates in the market and inspires us to keep pushing boundaries, delivering value, and staying ahead for the next generation.

Where do you see the wealth management industry and your part of it going in the next five years?

The future of wealth management is about family office-style structures with a purpose. Next-gen clients want more than just a service—they seek solutions aligned with their values and lifestyle to create real impact. The industry is shifting toward more personalized, flexible service providers that empower clients to shape their legacies. At Millésime, we lead this change by combining innovative strategies with long-lasting purpose, creating a model that truly resonates with the next generation.



Winner

• **Wealth Planning Solution
or Team - Latin America**

The Power of Integrating Technology and Investment Operations



STP combines expertise and innovative technology to deliver streamlined operations and data visibility so your firm can make informed decisions and focus on **growth**.



stpis.com
sales@stpis.com





Risclarity fills in the technology gaps wealth firms face when serving the complex needs of ultra-high net worth individuals and families.

We enable firms to simplify complexity so they can scale efficiently and securely.

We Simplify Complexity

Technology Solutions

Our DataHub platform fulfills the promise of best in breed technology by integrating siloed systems and data together providing you the tools and capabilities you need to manage the complexities of wealth.

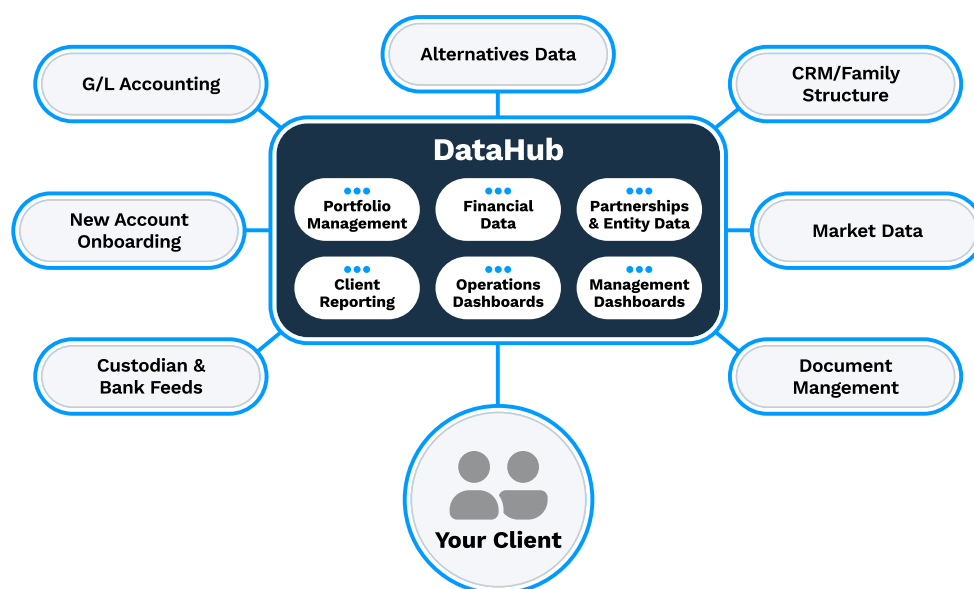
Integrations

We integrate your systems and bring together your data so that you can provide holistic service in a secure and scalable manner.

Back Office Services

Risclarity's Client Service team can augment and improve your back-office operations allowing your team to focus more on client facing tasks.

Risclarity helps cut through the complexity by bringing your systems, data, and processes together into one effective ecosystem.



Who We Serve



Family Offices



MFOs & RIAs



Private Banks

Solutions Tailored for Family Offices



GL Link

Reduce manual data entry by connecting and automating the flow of investment data into your financial accounting system.



Re-Allocator

Our family office specific rebalancing tool allows automate the process of shifting asset allocation and determining your next trade.



Client Reporting

We can augment and customized your existing reporting or provide stand alone wealth management and performance reporting.



Data Aggregation

Our data aggregation services can consolidate investment data from alternative investments, custodians and other 3rd-party sources.

Risclarity: Simplifying Complexity, Empowering Family Wealth Firms, and Leading the Future of Wealth Management

Risclarity bridges the technology gaps faced by family wealth firms serving ultra-high-net-worth clients. By integrating disparate data sources, we simplify complexity, enabling firms to scale operations and deliver comprehensive, cohesive reporting. Our approach empowers clients to grow securely and efficiently in an increasingly dynamic industry.

What was the winning formula of your firm/you that explains why you won?

Our winning formula is simplifying complexity for family wealth firms with customizable technology. We streamline wealth reporting by aggregating data from diverse custodians and asset classes, delivering innovative solutions tailored to client needs. What truly sets us apart is our blend of personalized technology, hands-on client support, and deep industry expertise—making us a tough act to follow.

How did your colleagues make a difference?

Our team is everything. A blend of technical talent and client service experts, many of whom have worked together for over a decade, fosters a culture of collaboration and innovation. Everyone is empowered to tackle challenges and deliver solutions that directly benefit clients. At Risclarity, client service is embedded in every role, and our shared passion for problem-solving drives our success.

What are you going to do to remain competitive and stay ahead?

To remain competitive and stay ahead, we will innovate continuously by expanding our platform and collaborating with clients to solve complex challenges, enhance client-driven features by refining platform capabilities based on their feedback, strengthen partnerships by building relationships with other tech providers to create a robust ecosystem, and prioritize security by staying ahead of cyber threats with best-in-class data security practices.

What challenges did you overcome, and how have you succeeded in fast-moving circumstances?

Our primary challenge has been adapting to the evolving needs of global family offices, especially managing multi-asset portfolios and meeting international regulations. Our success lies in staying nimble and responsive, backed by an experienced team that understands the complexities of family wealth. Their expertise, paired with our technology, ensures we remain ahead in this dynamic landscape.

Who inspires you, either inside or outside your organization?

We're inspired by our clients, who consistently push us to innovate and collaborate on solving complex challenges. Outside our organization, we draw inspiration from industry partners, who share our commitment to delivering exceptional service and value.

How do you hope your firm will benefit from this award?

Winning this award provides an incredible opportunity to enhance credibility by affirming our reputation as an industry leader, increase visibility by introducing our platform to more family offices and advisors—particularly in Miami and Latin America—and foster partnerships by opening doors to new collaborations and growth within the wealth management ecosystem.

Where do you see the wealth management industry, and your role in it, in five years?

The wealth management industry is evolving rapidly, with family offices thriving in private and commercial models. Core trends we foresee include personalization, with ongoing demand for tailored solutions; integrated technology, as seamless "best-of-breed" tech stacks become standard; AI advancements, driving smarter tools and greater efficiency; and data security, with increased focus on protecting sensitive information as technology advances.

Risclarity will remain pivotal, empowering family offices with scalable, secure, and adaptable tools aligned with these trends.



Rick Higgins
Founder and CEO
Risclarity



Winner

• **WealthTech Solution**
- **Miami**

Sophós Advisors

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



WINNER

Insurance Offering - Latin America

Sophos Advisors

Decades of collective industry experience

We are an independent organization that combines
specialized life insurance solutions, property and casualty
coverage, and captive insurance programs.

Caribbean - Latin America - Europe



Redefining Wealth Protection Through Innovation and Strategic Guidance

What was the winning formula of your firm/you that explains why you won?

Over the past 8.5 years, we have remained steadfast in our mission to deliver tailored insurance solutions while serving as advocates for our clients' interests within the broader insurance sector. Our unique value proposition lies in protecting not only the wealth families have accumulated but also the critical drivers of their success, their businesses, through our captive insurance solutions. This dual focus ensures comprehensive support for our clients' financial well-being and the security of their entrepreneurial ventures.

Our unwavering commitment to this mission has earned us a reputation as a trusted partner, recognized internationally for our expertise. By combining technical proficiency with exceptional interpersonal skills, we have built lasting collaborations with global families seeking to protect their assets, invest wisely, and secure a legacy for future generations.

Please describe how your colleagues made a difference?

The Sophos Advisors team comprises a diverse group of professionals, each bringing unique cultural perspectives, industry expertise, and extensive work experience to the table. Despite these varied backgrounds, we share a unified goal: delivering bespoke, high-quality services to our clients.

This sense of unity and purpose has been critical in building trust with our clients, enabling us to provide tailored solutions that align with their goals as families and entrepreneurs. Our collective expertise, dedication, and teamwork ensure we deliver exceptional value, making a tangible difference in our clients' lives and businesses.

How do you hope your firm will benefit from getting this award?

Receiving this award for the second consecutive year is a testament to the passion, hard work, and dedication of our team and partners. It reinforces our vision and validates our innovative approach and industry expertise.

Further, we believe this recognition elevates our reputation and credibility among institutional and private clients alike, further solidifying our position as a leading advisor in the wealth management sector. The award also inspires us to continue delivering the highest standards of service and innovation as we grow.

Where do you see the wealth management industry and your part of it going in the next five years?

The wealth management industry is moving towards greater transparency and heightened regulation. In this evolving landscape, maintaining high standards of professionalism, staying informed on industry trends, and adapting to new regulatory frameworks will be essential.

To succeed, wealth managers, financial institutions, businesses, and families must collaborate with the right specialists and problem-solvers to deliver innovative, client-centric solutions. By planning strategically and remaining adaptable, we can continue to help our clients achieve their objectives while navigating an increasingly complex global environment.

What are your ambitions for the business?

Our ambition is to expand our presence beyond the traditional Latin American Markets and the Caribbean, reinforcing our global footprint. We have already taken significant steps, including establishing an office and team in Switzerland, whilst building partnerships across Latin America.

By the end of this year, we aim to have a physical presence in Europe and the Middle East. These expansions will enhance our ability to serve High-Net-Worth (HNW) families and Entrepreneurs in Europe, the Middle East, Africa, and Central Asia, marking a critical milestone in our international growth strategy.



Geralda Kral
Partner, Switzerland

Alejandro Gil
Partner, Miami & Switzerland

Jorge Carstensen
Partner, Miami & Switzerland

Alvaro Becerra
Partner, Switzerland

Sophos Advisors



Winner

• Insurance Offering
- Latin America

STONEHAGE FLEMING

GLOBAL EXPERTISE AND TAILORED SOLUTIONS FOR INTERNATIONAL FAMILIES

At Stonehage Fleming, we provide bespoke wealth management solutions for multi-generational and multi-jurisdictional families.

With over five decades of experience, we understand the unique challenges families face, offering strategies to protect assets, manage risks, and navigate global expansion. Our open-architecture platform enables seamless collaboration with a family's existing advisors, ensuring a holistic approach that aligns with their long-term goals.

At every stage of a family's journey, we are their trusted advisor, helping them navigate complex international challenges and supporting them through transitions, preserving legacies and safeguarding wealth across the generations.

 [STONEHAGEFLEMING.COM](https://www.stonehagefleming.com)

For more information and a discussion
with our team, please contact
enquiries@stonehagefleming.com



NOW AND FOR FUTURE GENERATIONS

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Stonehage Fleming's Winning Miami Formula: Mastering Holistic Solutions for Multi-Generational Prosperity



Johan van Niekerk
Partner - Head of Family Office, US
Lowry Brescia
Associate Director - Family Office
Stonehage Fleming



What was the winning formula of your firm/you that explains why you won?

We have achieved success at Stonehage Fleming through our deep understanding of multi-jurisdictional, multi-generational wealth management, which we have honed over five decades. Our holistic service platform seamlessly integrates with our clients' existing advisors, ensuring bespoke solutions that protect their wealth across generations. We support families in articulating the purpose of their wealth and building trust on long-term vision and values. Our strong foundations in Europe and Africa, has supported our expanding remit into Miami. Likewise, the similarities in legal frameworks and geopolitical contexts between Africa and Latin America provide a robust basis for our team to proactively address the unique complexities facing Latin American families.

Please describe how your colleagues made a difference?

Stonehage Fleming continues to be a trusted adviser to some of the world's most prominent families and wealth creators. We draw upon Practical wisdom from a seven-generation family at the core of our international business. Our success is driven by our exceptional colleagues, who bring diverse expertise and an unwavering commitment to client service. Our multi-disciplinary approach ensures that we provide a comprehensive and integrated service to our clients. By respecting cultural nuances and maintaining a deep understanding of the complex legal, financial, and governance needs of Latin American families, our colleagues help us offer tailored solutions that support clients' goals.

What are you going to do to remain competitive and stay ahead?

We take great pride in our ability to adapt to complex landscapes and provide a comprehensive range of services. Our open-

architecture service platform facilitates collaboration with external advisors, ensuring that families receive the best solutions available. Furthermore, our commitment to thought leadership and education, such as our annual Next Generation Course for young people who take part in interactive sessions on leadership, family dynamics, communication and the foundations of finance and business.

In addition, we have our Four Pillars of Capital report, proprietary research conducted every few years with leading families globally on issues they see as risks to their wealth. It has become an instrumental tool in helping us advise families to stay ahead of emerging trends. Our flourishing hubs in Miami and burgeoning Latin American client base further strengthens our ability to provide localized support while maintaining a global perspective.

Where do you see the wealth management industry and your part of it going in the next five years?

The wealth management industry will continue to evolve, driven by increased demand for bespoke, multi-jurisdictional services that address complex geopolitical and economic risks. Amidst changing political landscapes and economic trends, there is a notable increase in demand for services in reputational management, enhanced educational opportunities for the next generation, and greater involvement of women in leadership roles within family businesses and family offices.

Firms like Stonehage Fleming, with deep expertise across regions and a commitment to fiduciary responsibility, will lead the way in offering holistic solutions that span generations and jurisdictions. We foresee technology playing an increasingly important role. At the same time, our emphasis on long-term relationships and education will continue to support the next generation of wealth creators, ensuring sustainable success for families across the globe.

Engagement: meet digital unification

Managing wealth requires more than expertise in today's fast-paced world—it demands collaboration, scalability, and client access to all their data. Our cutting-edge engagement platform empowers families, clients, and wealth advisors to reduce complexity and enhance the digital client experience.

- **Seamless Collaboration.** Centralized communication tools foster engagement and alignment between family members, operating executives, and advisors.
- **Scalable Solutions.** Activate vendor-neutral, solution-specific apps that adapt to evolving client demands and industry trends, integrate with accounting, portfolio management, and other systems, and can be configured anytime.
- **Security & Compliance.** Robust encryption and compliance features safeguard digital assets and communication while maintaining regulatory standards.

SUMMITAS

Schedule a demo today at summitas.com/dialogue

Summitas - Leading the Digital Client Experience (DCE) Journey



Bill Wyman
President, Family Office Services
Summitas, LLC



How do your Summitas colleagues make a difference?

Summitas is at the forefront of the DCE, focusing on innovation, client success, and seamless integration. Our success stems from my colleague's outstanding efforts, relentless drive to remain competitive, and a forward-thinking approach to industry challenges.

What sets us apart is Summitas Engage™, our white-glove Customer Success team. They are the clients' primary interface and are responsible for post-sale setup, onboarding, training, software enhancements, integrations, and continuous 24/7 support.

Technology thrives when used and only when clients find value in its offerings. Our team ensures that clients derive daily value from our platform by simplifying their services and providing decision-makers with the information they need when they need it. By prioritizing client needs, Summitas delivers a service far beyond problem-solving—we enable our clients' vision as partners to help build their long-term success.

What are you doing to stay competitive and ahead of the curve?

Summitas remains competitive by proactively proving ROI and continuously enhancing our product roadmap to create future value. We first understand the client's technology stack, business drivers, and key performance indicators to foster long-term relationships and exceptional client satisfaction.

Our efforts are reflected in our consistently high Net Promoter Score and industry-leading client retention rates. A shining example is our first family client, who has been with us since 2011. Over the past 14 years, we've evolved alongside their needs, becoming an integral part of their service platform. As their CEO stated, "We couldn't do what we do were it not for Summitas."

To stay ahead, we listen to our clients, analyze competitor trends, and anticipate emerging challenges. We remain the premier DCE platform in an increasingly competitive landscape by continuously innovating.

How do you hope your firm will benefit from getting this award?

Winning 'Best Technology Provider' and other industry awards, including 'Innovator of the Year' and 'Best Customer-Facing Digital Platform', affirms that we are on the right track.

To date, Summitas has earned 19 awards, highlighting our success and motivating us to continue providing technology solutions that adapt to evolving client demands and industry trends. We take pride in these achievements and are grateful for our clients' and partners' trust in us.

Where do you see the future of wealth management and your part of it going into the next five years?

Deloitte reported that the number of single-family offices is projected to grow by 75% by 2030, with AuM rising to \$5.4 trillion. This expanding market and the growth rates of RIAs and MFOs will require innovative tech solutions.

Summitas is ready to meet these challenges by delivering a unified client experience, solution-specific apps, accounting, portfolio management, and other system integrations, as well as client access to all their data to ensure that we continue to provide the best solutions for our clients.

At Summitas, we remain committed to driving the digital client experience forward—today and in the future.



Estate
Planning



Asset
Protection



Generational Wealth
Preservation



Tailor-made Solutions
from a Range of Trust &
Corporate Services



An Extension of
Our Clients' Team



Dedicated &
Experienced Team of
Private Wealth
Practitioners



Global
Coverage

CITCO

YOUR PATHFINDING PARTNER FOR PRIVATE WEALTH

*For more than 75 years, HNW individuals and families
have put their trust in us to preserve and grow their
assets for future generations*

For further information contact:

Ernesto Mairhofer

T +1 305 577 0233

E emairhofer@citco.com



citco.com

Building A True Partnership With Citco



Ernesto Mairhofer

Head of Private Wealth and Family Offices
The Citco Group of Companies (Citco)



Winner

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

What was the winning formula of your firm/you that explains why you won?

Citco is a family-built, people-driven business, with 75 years of experience in supporting high-net-worth individuals and families with the preservation and growth of their assets for future generations. As a business we understand our clients' unique needs and make it a priority to really listen to their challenges, whilst helping them to navigate the changing global environment in which they operate. We have always striven to build long-term partnerships with both our clients and their advisors, and this has contributed to our success today.

Personally, I have found my work with the Latin American community, in particular, very rewarding. Over the years I have built up a strong network across key countries and professional groups within the region. This all started with a simple goal of creating and growing an international community for collaboration and learning, drawing from different jurisdictions and industry experts. In order to serve clients at a high level, there is a continuous need to educate ourselves, learn from each other and give back as a community.

Please describe how your colleagues made a difference?

I have been working at Citco for more than 25 years, and I am pleased to say that we work among not only colleagues but also friends, and that makes a difference. I am proud to be a part of large team of experienced professionals with expertise across multiple disciplines, who share the same passion for client service and excellence. Together, we are focused on delivering the best possible service to our clients to ensure they can achieve their estate planning, wealth preservation and investment strategies.

What are you going to do to remain competitive and stay ahead?

Cultivating our relationship with families and their advisors remains a key priority. In addition to this, we have to keep up-to-date with the revolving door of trends and changes affecting our clients. They expect us to keep them informed and educated so they can in turn make important decisions. Lastly, we continue to invest in technology and new tools which will allow us to service clients more efficiently.

Where do you see the wealth management industry and your part of it going in the next five years?

Personalization has been a constant cornerstone of the wealth management industry and continues to stand the test of time. Despite the innovations and efficiencies brought in by the ever-evolving technological wave, at Citco we believe there is still great value in maintaining a personalized approach and delivering a completely tailored package of services for each of our private wealth clients.

This challenge of striking the right balance will continue to be tested as we enter 'The Great Wealth Transfer' stretching ahead of us in the next two decades. Widely described as the largest wealth transfer in history, there will be an important role to play in supporting our clients through this significant period of change which is centered on the transfer of assets to the next generation. Clients will look to us to help manage the differing expectations and goals often found within multi-generational families. A number of factors will come to the fore, from navigating family dynamics and next generation engagement, through to estate planning and tax considerations.

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.

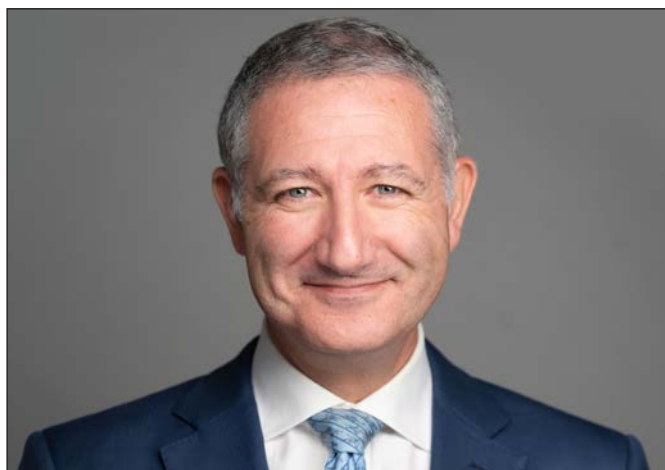


www.familyofficedr.com



enquires@familyofficedr.com

The Family Office Quarterback: How Samy Dwek Guides Multi- generational Wealth & Harmony



Samy Dwek
CEO
The Family Office Doctor



Samy Dwek is the “Family Office Doctor.” After a successful career in wealth management with global businesses and high net worth families, he now counsels global family offices with a client-centric approach that helps navigate the financial, governance, investing, philanthropic and foundational efforts, oversight, even conflict avoidance and resolution issues common to family offices. Learn more at www.FamilyOfficeDr.com

How an outside ‘quarterback’ can help your family office succeed

Family offices are unique entities blending business operations with deeply personal family dynamics. Managing portfolios, real estate, and staff while preserving wealth is only part of the equation. The core challenge lies in navigating the complex and sometimes fraught relationships within the family itself.

Enter the “Family Office Doctor”

Samy Dwek, named “Outstanding CEO of the Year” for South Florida, Latin America, and the Caribbean by the Family Wealth Organization, brings four decades of expertise to guide multi-generational families worldwide. Drawing from his experience as a JP Morgan managing director and now as a private consultant, Dwek specializes in addressing family office challenges, ensuring both familial harmony and financial prosperity.

What should I look for in a family office counselor?

“The counselor must prioritize the client,” Dwek emphasizes. His tenure at JP Morgan honed his skills in managing family office needs, from investments to interpersonal dynamics. What sets an excellent advisor apart is genuine care—being personally invested in resolving financial and emotional challenges to help families heal and thrive.

What sets a global counselor apart from others?

Are they globally aware and culturally attuned? My parents were from the Middle East and Europe, where I grew up. Even today, my extended family’s holdings are wide, and family ties impact all

aspects of our business and personal lives. We’re raising our family in South Florida, known as the “gateway to the Americas” and increasingly the world. It’s complex and challenging and teeming with opportunity. That reality puts me in a unique place to understand each client’s unique needs.

How do advisors help their client families?

We help them with the issues they face. Look, many families have some degree of dysfunction. Mine did. It’s normal, but to each family, it’s new and must be faced and navigated. For over 25 years, I’ve helped families to not implode when faced with the weight of family issues. I’m not their attorney or accountant or broker. I become their counselor. Together we find ways to deal with their unique obstacles and move forward as a family. In time, I practically become a family member, that “uncle” helping educate their kids about the family’s goals and their own place in the family mission, that quarterback you call to answer tough questions with solid advice.

How are you different from other counselors?

You still need your attorneys, accountants and brokers. I’m different. I’m your chief-of-staff making sense of often confusing advice from others. But rest assured: everything we do together is under strict confidentiality, even under Kovel agreements with your lawyers to ensure “attorney/client”-level privilege.

How do I learn more?

It all starts with a phone call. After you’ve given some thought to what you and your family need, where you might be lacking, and how a counselor can help, your counselor should offer a few referral sources to ensure you’ve got the right person. Then, together, you can draw up a plan to help guide your future.

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



CONTACT | Jordan Vitek
Head of Corporate Services
South Dakota
jvitek@tridenttrust.com
US | +1 605 679 4355

Trident Trust: Driving Global Success Through Expertise, Innovation, and Client-Centric Solutions



Trident Trust

Established in 1978 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 1,100 staff across a global footprint that spans Africa, the Americas, Asia, the Caribbean, Europe, and the Middle East.

Privately owned and independent, we support high-net-worth families and family offices, leading financial institutions, professional advisors, and asset managers. Our clients 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?

Trident Trust's growth has largely been driven organically, with strategic acquisitions playing a complementary role. The foundation of our continued success lies in the commitment and entrepreneurial spirit our management teams and colleagues demonstrate daily. We are exceptionally proud of the culture of our Group that allows our teams to flourish.

In an increasingly complex and global environment, we remain focused on expanding our jurisdictional presence and enhancing our service offerings. Every client is treated as unique; we dedicate time to understanding their specific needs and goals to offer tailored solutions, 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 focus on nurturing junior staff, setting them on a career journey and supporting their professional and personal growth, while also investing in specialist and experienced staff to strengthen our teams and client service, and ensure depth of expertise within our organization.

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

Industry awards are a recognition of the exceptional value and

service we provide, sending a clear message to the market and our peers while reaffirming to our teams that their dedication is recognized and appreciated.

That said, we remain focused on consistently delivering at the highest level. Our service and responsiveness are judged by our clients every single day, and we set ourselves incredibly high standards that we work hard to maintain. While awards are an opportunity to celebrate, they also inspire us to continually refine and improve.

How and in what ways do you measure success?

While financial performance is an important measure of our success, we also evaluate it through several other key indicators. The size and range of our client portfolio reflect the reach and relevance of our services, while the longevity of relationships, both with clients and staff, highlights the trust and loyalty we have built.

Repeat business is another critical factor, as it demonstrates our ability to adapt to clients' evolving needs and maintain their confidence over time. Referrals, whether from satisfied clients or team members, serve as a testament to the quality of our service and workplace culture. Finally, we place great importance on client retention and listening to feedback. Learning from both positive and constructive input is essential for continuously refining and improving what we do.

What are your ambitions for the business?

Our ambition is simple: to create a sustainable business environment and culture, while continually investing in our infrastructure and technology. This ensures that our skilled professionals have the tools and resources they need to provide our clients with the services and solutions to meet their bespoke and changing goals and requirements.

By staying true to these principles, we aim to maintain steady growth and development, ensuring we remain a trusted partner for years to come.



WATERMARK

PHILANTHROPIC COUNSEL

Your philanthropy matters.

Serving leading philanthropists, generous families, and social purpose organizations, Watermark helps those who give, give well, and channel their wealth and influence for good.

GIVING STRATEGY. FAMILY ENGAGEMENT. GOVERNANCE

watermarkpc.com



Helping Families Give with Purpose



Dr. Sharilyn Hale, C. Dir
Founder and President
Watermark Philanthropic Counsel

What was the winning formula of your firm/you that explains why you won?

We help generous people and families give well, and channel their wealth and influence for good. Based in Canada while serving clients across North America and the Caribbean, Watermark Philanthropic Counsel is known for developing purposeful giving strategies, engaging family in the experience, and crafting meaningful approaches to governance.

Our work is bespoke, informed by each client's needs and objectives. Our clients benefit with clarity and confidence in their giving from our experience working in and with communities across jurisdictions, diverse networks, and deep expertise in ways to achieve results on the issues and for the people they care about.

What are you going to do to remain competitive and stay ahead?

Continual learning through experience and research are hallmarks of Watermark's culture, and a differentiator for our clients. Our founder and President, Dr. Sharilyn Hale, has more than 25 years of experience in philanthropic communities, and she's still learning. She understands the landscape, challenges, and realities of making positive change in the world, ensuring our clients benefit from real-world and real-time grounding.

Dr. Hale is also a researcher, and her doctoral research focused on governance and multi-generational family philanthropy. Having grown up in the Caribbean, she was inspired by her clients and her keen interest in philanthropy in the region, to publish, *"A Portrait of Affluent Giving in the Caribbean: Experiences, barriers, and the future of philanthropy"*. This work is among the only data available on HNW/UHNW giving in the region, helpful to her clients, charities, and the family wealth ecosystem.

Who inspires you, either inside or outside your organization?

We're inspired every day by the people and families we're able to work with who find purpose in making the world better. In the Caribbean, this includes nationals – those who have created or inherited their wealth here, give and volunteer. It also includes non-nationals – those who have found their heart's home in the region, and are incredibly generous. And, those from diaspora communities who feel compelled to 'give back home'.

How do you hope your firm will benefit from getting this award?

We're most interested in how this award puts a spotlight on the philanthropy that is happening in the Caribbean that often goes unseen. We also hope it serves as a catalyst for more people, families, and other advisors to families, to make philanthropy a greater priority and to know help is available. When those who give, give well, it can help strengthen the region's social, cultural and environmental infrastructure.

Where do you see the wealth management industry and your part of it going in the next five years?

Family wealth clients deserve and are asking for more professionalism and integration from their advisors, and Watermark is skilled at collaborating across disciplines to ensure exceptional client service. Philanthropy and social impact will continue to grow in importance to families and the rising generations, where success is increasingly defined by issues of purpose. Working beyond technical and structural considerations of giving, Watermark's work with clients is rooted in purpose - for family and community. With expert counsel, this elevates the role philanthropy can play in the life and future of a family for generations to come.



Family **Wealth** Report
AWARDS 2025

MIAMI, LATIN AMERICA & CARIBBEAN

WINNER

*Outstanding Contribution to Wealth Management
Thought Leadership (Individual) - Miami*

**Daniel Scott Johnson,
Windfall Advisors LLC**

Specialization of "SUDDEN" Wealth Management



Daniel Scott Johnson
Founder
Windfall Advisors LLC



Who inspires you, either inside or outside your organization?

The incredible life events and personal stories from the people across the country we work with.

To the clients surviving and overcoming a near death accident and receiving a multi million dollar settlement after years of operations and time in the courtroom.

To the personal stories of those experiencing a loss of a loved one, receiving a substantial inheritance, and carrying out their wishes and life values through philanthropic activities.

Being there for a widower, a divorcee, or helping educate and prep minors for handing substantial wealth when they assume control over assets.

How do you hope your firm will benefit from getting this award?

We're very grateful for this exposure. It's our hope that future recipients of a substantial sudden financial windfall benefit from the resources of Windfall Advisors.

Given the unique nature of a "Sudden" financial windfall, there are very unique behavioural, emotional, and psychological patterns clients will face that set their future trajectory on a positive or unfortunately negative path. Windfall Advisors has been recognized as the go to specialty firm for these specific situations.

What was the winning formula of your firm/you that explains why you won?

Specialization, Responsiveness, compassion, results.

Clients sharing their unique experience with Windfall Advisors through reviews and having a perfect regulatory record.

What sort of challenges did you surmount to reach this level and how have you been able to succeed in such fast-moving circumstances?

Our biggest challenge in reaching this level has been competing against and gaining recognition over the largest and most recognized global wealth management firms. Carving out a unique and underserved area being the specialization of "Sudden" wealth management has contributed to our success.

Windfall Advisors is a nationally recognized fee-only fiduciary registered investment advisors (RIA) specializing in protecting, planning and growing financial windfalls into lasting legacies.

Sudden wealth examples include receiving a substantial inheritance, winning the lotto, receiving a substantial settlement award, newly divorced, selling a company or property, sudden success in sports or entertainment.





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.

The Miami *Family Wealth Report* Awards incorporating Latin America and the Caribbean Winners 2025

WEALTH MANAGEMENT SERVICE CATEGORIES

**Investment Platform
- Latin America**

WINNER



**Team Servicing
UHNW Individuals
- Latin America**

WINNER



**Wealth Planning
Solution or Team
- Latin America**

WINNER



**Philanthropy
Advisory - Miami**

WINNER



**Family Office Services
- Miami**

WINNER



NOW AND FOR FUTURE GENERATIONS

**Next Generation
Program - Miami**

WINNER



**Wealth Planning
Solution - Miami**

WINNER





WINNER: Summitas, LLC



WINNER: Ernesto Mairhofer - The Citco Group of Companies (Citco)



WINNER: Samy Dwek - The Family Office Doctor



WINNER: Trident Trust



WINNER: Anabella Murillo - IQ-EQ

PRIVATE CLIENT CATEGORIES

Institutional Trust Firm - Caribbean

WINNER



Independent Trust Firm - Caribbean

WINNER



Trust Administration Service

WINNER



Estate Planning Advisory - Caribbean

WINNER



Independent Trust Firm - Latin America

WINNER



Trust Company

WINNER



Trust Administration - Miami

WINNER



Legal Practice - Miami

WINNER



Estate Planning Advisory - Miami

WINNER



INDEPENDENT WEALTH MANAGERS CATEGORY

Asset Manager - Miami

WINNER



PRIVATE BANKING CATEGORY

Investment Management Platform - Miami

WINNER





WINNER: Watermark Philanthropic Counsel



WINNER: Daniel Scott Johnson - Windfall Advisors LLC



WINNER: Bryn Mawr Trust



WINNER: Sarah Jacobson - Day Pitney LLP



TEAM BASED CATEGORIES

**Spanish-Portuguese
Speaking Clients Team**

WINNER

 TRIDENTTRUST

**Domestic US Clients
Team - Miami**

WINNER

IQEQ
Know how Know you

**International Clients
Team**

WINNER

 TRIDENTTRUST

**Investment
Management Team - Miami**

WINNER

CAYSIDE
PARTNERS

OVERALL REGIONAL TECHNOLOGY CATEGORIES

**WealthTech Solution
- Miami**

WINNER

RISCLARITY


**RegTech Solution
- Miami**

WINNER


STP

**WealthTech Solution
- Latin America**

WINNER

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SPECIALIST AND INDIVIDUAL CATEGORIES

**Consultancy
- Caribbean****WINNER****WATERMARK**
PHILANTHROPIC COUNSEL**Insurance Offering
- Latin America****WINNER****Lawyer or Legal
Counsel (Individual)
- Latin America****WINNER****DANNY DIAZ LEYVA****Outstanding Female
Executive - Latin America****WINNER****ANABELLA MURILLO****Outstanding
Contribution to Wealth Man-
agement Thought Leadership
(Individual) - Latin America****WINNER****ERNESTO MAIRHOFFER****Lawyer or Legal
Counsel - Miami****WINNER****SARAH JACOBSON****Diversity, Equality
and Inclusion - Miami****WINNER**

A WSFS COMPANY

**Outstanding CEO
- Miami****WINNER****SAMY DWEK****The Family Office Doctor****Outstanding
Contribution to Wealth
Management Thought
Leadership (Individual) - Miami****WINNER****DANIEL SCOTT JOHNSON**



THE GUIDANCE AND EXPERTISE YOU EXPECT.
THE PERSONAL ATTENTION YOU DESERVE.

Bryn Mawr Trust is honored to be
recognized in six categories by Family
Wealth Report.



FamilyWealthReport
AWARDS2025

MIAMI, LATIN AMERICA & CARIBBEAN

WINNER

Investment Management Platform - Miami

Philanthropy Advisory - Miami

Wealth Planning Solution - Miami

Asset Manager - Miami

Estate Planning Advisory - Miami

Diversity, Equality and Inclusion - Miami

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GLOBAL AWARDS

Showcasing The Best in the Industry

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



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2025 Announcements Schedule

16 JANUARY 2025

Miami Family Wealth Report Awards
incorporating Latin America & the Caribbean

6 & 20 FEBRUARY 2025

WealthBriefing Swiss Awards
WealthBriefing WealthTech Americas Awards

5 & 27 MARCH 2025

WealthBriefing Swiss EAM Awards
WealthBriefing European Awards

8 MAY 2025

Family Wealth Report Awards

5 & 26 JUNE 2025

WealthBriefingAsia & Greater China Awards
WealthBriefing Wealth For Good Awards

16 OCTOBER 2025

WealthBriefingAsia EAM Awards

20 NOVEMBER 2025

WealthBriefing MENA Awards

3 DECEMBER 2025

WealthBriefing Channel Islands Awards



For more information: + 44 (0) 20 7148 0188 (UK Office)

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