

Wealth & Asset Management

AWARDS 2024

Celebrating success and
innovation in the wealth and
asset management industry

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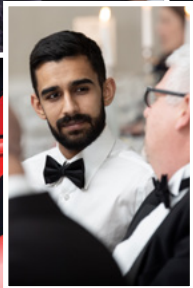
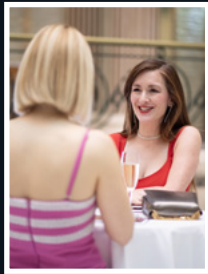
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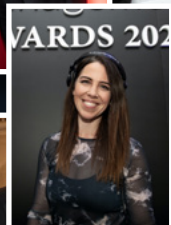
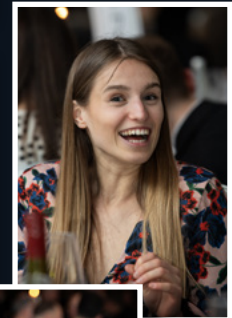
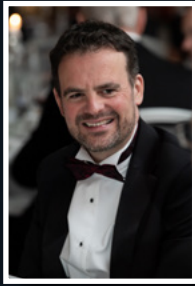
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OVERVIEW

The Wealth & Asset Management Awards 2024 were held at the Waldorf Hilton, London, to showcase the highest level asset managers in the institutional and retail investment spaces. The ceremony was hosted by comedian Suzi Ruffell, who helped to present trophies. Congratulations to the winners and well done to all the firms who were highly commended or shortlisted on the night. A huge thank you must go to our judging panel, for their time and expertise. Many thanks also to our sponsor, SimplyBiz, and to all those who entered and attended the awards. We look forward to welcoming you all again in 2025.

For more information on our events please visit www.insuranceassetmanagement.net, where you can also read all the latest news and commentary from the global insurance industry.

Adam Cadle, Editor,
Insurance Asset Management

2024 JUDGING PANEL



Chair of judges:
Adam Cadle
Editor
Corporate
Finance News,
Insurance Asset
Management and
MoneyAge



**Annabel
Brodie-Smith**
Communications
Director
Association of
Investment
Companies (AIC)



David Butcher
Founder &
Director
Communications
and Content



**Bella
Caridade-Ferreira**
CEO
Fundscape



**Reuben
Overmark**
Senior Policy
Adviser,
Retail Markets
The Investment
Association

Wealth & Asset Management AWARDS 2024

WINNERS GALLERY



PASSIVE MANAGER
OF THE YEAR
Kraneshares



ASSET MANAGER OF THE
YEAR (up to €100bn AuM)
Bordier UK



MULTI ASSET MANAGER
OF THE YEAR
**Progeny Asset
Management**



ASSET MANAGER OF THE
YEAR (over €100bn AuM)
**Royal London Asset
Management**



PROPERTY MANAGER
OF THE YEAR
Patron Capital



EQUITIES MANAGER
OF THE YEAR
TOBAM



INFRASTRUCTURE
MANAGER OF THE YEAR
Infrantry



FIXED INCOME MANAGER
OF THE YEAR (UP TO
€100BN AUM)
**Royal London Asset
Management**



ALTERNATIVES
INVESTMENT PROVIDER
OF THE YEAR
**Argenta Private
Capital**



ACTIVE MANAGER
OF THE YEAR
Fisher Investments



PRIVATE EQUITY
MANAGER OF THE YEAR
Neuberger Berman

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Wealth & Asset Management AWARDS 2024



**EMERGING MARKETS
MANAGER OF THE YEAR**
Arkaim Advisors



**INVESTMENT
CONSULTANCY
OF THE YEAR**
Fundhouse



**FIDUCIARY MANAGER
OF THE YEAR**
**Charles Stanley
Fiduciary Management**



**MARKETING CAMPAIGN
OF THE YEAR**
True Potential



**WEALTH MANAGEMENT
FIRM OF THE YEAR –
sponsored by SimplyBiz**
EQ Investors



INNOVATION OF THE YEAR
1fs Wealth

HIGHLY COMMENDED
Hargreaves Lansdown



**WEALTHTECH FIRM
OF THE YEAR**
True Potential

HIGHLY COMMENDED
1fs Wealth



**ESG INITIATIVE
OF THE YEAR**
Santander



**FAMILY OFFICE
OF THE YEAR**
**ALTi Tiedemann
Global**



DIVERSITY AWARD
**Hargreaves
Lansdown**



LAW FIRM OF THE YEAR
Druces LLP



**TECHNOLOGY FIRM
OF THE YEAR**
True Potential

WINNER

true potential LLP*
simple. effective. unique.

Wealthtech Firm of the Year - True Potential

The Marketing Campaign of the Year is awarded to the company that can clearly display how a new or existing marketing campaign has been implemented within the structure of the asset management firm, and ultimately helped to boost the business.

This year's winning firm was True Potential, which picked up its second award of the night after the judges said it had detailed an impressive campaign driven by research which had been successful in winning new clients for the firm.

True Potential's award-winning campaign centred on the 39 million people who fall into the 'advice gap'. This includes those who either need or would benefit from financial advice and are not receiving it, because either they feel that advice is for the 'elite' or are simply unaware that these services exist.

Work on the campaign began in January 2023 focused on addressing the challenge of attempting to sell a service to someone who is not actively looking for it.

The first step was to conduct extensive research on the group's target audience to understand the feeling around True Potential as a brand, and what would trigger an audience into a purchase decision, or what could possibly dissuade a potential client from buying.

Having identified several key takeaways around the language the firm could use with potential clients, True Potential then

focused on Manchester and the North West as a test bed for the rest of the UK.

The firm conducted a benchmarking survey to gauge the level of awareness of the True Potential brand, and then devised a strategy to run a short three-month campaign in the area to see if it could increase brand awareness. This strategy was a huge success, with awareness of the True Potential brand increasing in Manchester from 14% to 43%.

True Potential then began work on the full launch and developed the campaign 'Reach Your True Potential'. The concept of the campaign tackled the takeaways from the research and focused on life goals, as well as the idea that the longer they are left, the more difficult they can be to achieve.

This was communicated through a TV, video on demand and cinema advert, and was supported by billboards around busy commuter areas, tram cards, intelligent digital display adverts and social media.

The main campaign since launch has been a significant success in terms of the support it offers True Potential's local wealth management partners, but importantly has attracted a huge increase in new clients joining the firm. In the three months following launch, True Potential saw a 51% increase based on its yearly average.

Congratulations to True Potential on such a well-executed marketing campaign.





Give yourself a pay rise.

You could be earning more. Much more.

We believe that we have the best package in the market for financial advisers and their business, allowing you to keep up to 95% of the fees that you earn and 100% of fees earned over £150,000.

If you're looking for a change, try our pay rise calculator to see how much more you could earn with True Potential Wealth Management.

Visit truepotential.co.uk/payrise to calculate your pay rise today.

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WINNER

true potential^{LLP*}
simple. effective. unique.

Marketing Campaign of the Year - True Potential

This category rewards the firm that has built services that are personal to every client while using cutting-edge AI and digital technologies to democratise wealth management.

True Potential was named this year's Wealthtech Firm of the Year after the judges praised its forward-thinking approach to wealth management, which they said is characterised by a democratisation of wealth management, client empowerment, personalised service, and innovation.

Since launching in 2007, True Potential has delivered its vision of hybrid financial advice to the UK.

As 2023 came to a close, 125,000 clients were benefitting from the hybrid advice model from, and True Potential's blend of regulated financial advice and technology truly puts its clients firmly in control of their money.

Key to the success of True Potential's wealthtech offering, the firm also boasts an impressive mobile app. This app saw 6.4 million logins last year, and allows clients to monitor and manage their assets and performance, access documentation and rewards, and communicate securely with their adviser.

The primary use is for clients to check their portfolio value, but advisers also have 24/7 access to the True Potential platform and real-time valuations.

True Potential has also continued to innovate its mobile app with a heavy focus on delivering

value and a personal experience to the end user. This has included clearer graphs and charts to track investment progress, the ability to manage and upload documents, a facility to view personal details, asset allocation and investment commentary – all within a cleaner, more polished dashboard.

The firm's AI bot can have a conversation with the client to determine other required information in order to look up the client's account, and once the bot has identified and verified the required information, it will then automatically send a reset email while only sharing a partial email address with the client for security reasons.

Elsewhere in the business, True Potential has launched its 'CarPlay' feature, where clients can listen to the group's morning market videos and podcast content while they travel.

True Potential is also further utilising AI, big data, and machine learning to improve its posture from a hyper-personalisation point of view so it can speak to clients at the right time for them about the right subject.

The firm is also advancing its technology and will soon be using its 'Generative AI' functionality to offer clients a 'Personalised Account Summary', which will provide an overview of their wealth, portfolio value, markets, and reminders of any important actions.

We send our congratulations to True

Potential for showcasing an outstanding wealthtech offering.



WINNER

true potential LLP*
simple. effective. unique.

Technology Firm of the Year - True Potential

The Technology Firm of the Year category recognises the tech firms across the asset management or wealth management spaces that have excelled in the simplification of the complex world of investment reporting. In their entries, firms are expected to display examples of strong levels of innovation, client satisfaction and communication expertise.

Making it a hat trick of wins on the night, True Potential also took home the award for Technology Firm of the Year.

While the judges were full of praise for True Potential in the wealthtech category, it was the firm's impulseSave which caught the eye in this category, after judges described the offering as "superbly executed" and "brilliant".

As well as having access to an expert financial adviser, True Potential's clients use its industry leading and award-winning technology to stay in control of their investments 24/7, tracking real-time valuations against their goals and topping up using the unique technology of impulseSave.

The creation of impulseSave in 2013 has enabled members of the public to open and top up their investments in seconds from their mobile devices and from as little as £1. This offering has had a transformative effect on the industry as it made investing accessible to everyone.

True Potential has seen almost £789m invested by impulseSave since launch – proving that small changes can make a big difference.

In the space of a year, True Potential has overseen 8.1 million logins from over 500,000 clients using this technology to self-serve within the platform. In 2023, 26,859 clients used the firm's drawdown technology to manage their retirement income, freeing up advisers to spend time on advice and business growth.

The group's video call technology can also provide clients with the ability to book video appointments with their advisers via their online account or app, without the need for alternative digital communications such as Zoom.

Soon, the firm will even be able to use AI to transcript the call, to summarise and create follow up actions. This won't replace the need for the adviser to take their own notes, but it will help support with accuracy and save time.

It is True Potential's in-house development team behind innovations such as this, allowing the firm to remain agile and adaptable in providing clients with seamless integration and cohesion.

This means that the firm can continue to develop and release new updates throughout the year, innovating and delivering new features to power the end-to-end client journey and ultimately ensure that clients are doing more with their money.

We send again our congratulations

to True Potential for an outstanding third award win on the night.



WINNER

NEUBERGER BERMAN

Private Equity Manager of the Year - Neuberger Berman

In order to be nominated for the Private Equity Manager of the Year award, firms must demonstrate a desire to assist their clients to obtain the most from this complex area of the market.

Whether across the institutional asset management or retail asset management space, firms must have shown that they have an exceptional understanding of the market in which they are dealing.

For the second year in a row, and the fourth time in five years, the winner of the private equity manager of the year was Neuberger Berman.

The employee-owned, private, independent investment manager currently manages \$474bn of equities, fixed income and private markets strategies and other alternatives for global institutions, advisers and individuals.

NB Private Markets manages over \$115bn of investor commitments across primary funds, co-investments, secondary investment, private credit and speciality strategies.

When it came to choosing the winner of this award, the judges were particularly impressed with the firm's performance across these investor commitments.

NB Private Markets has built a strong global network of relationships with high-quality private equity sponsors. As a result, it sees a high proportion of opportunities, including oversubscribed and invite-only funds, in a variety of asset classes, geographies and industries.

Access to high-quality opportunities, combined with a disciplined investment process, has allowed the team to build an attractive track-record.

In 2023, the firm committed over \$4bn to 75 primary fund investments globally.

In its secondary business, the team purchases interests in seasoned private equity funds from investors desiring liquidity, and also leads and participates in GP-led transactions.

The group invests across strategies, geographies, and vintages and acquires interests from various types of sellers, including pension plans, endowments, financial institutions, family offices, and high net worth individuals.

The team is generally opportunistic, evaluating transactions of varying sizes and across all market segments with a main focus on proprietary, privately negotiated small to mid-sized transactions, and committed \$2.5bn to secondary investments in 2023.

Performing robust, bottom-up, company-by-company valuations, and due diligence analysis, NB Private Markets has demonstrated extensive experience and knowledge in secondary fund investing, making it a well-known and established secondary buyer.

Congratulations to Neuberger Berman on yet another award and for an entry that showcased an outstanding private equity offering.



Awards/Ratings are not indicative of the performance of any NB product/service. NB Private Markets did not pay a fee to participate.

Neuberger Berman Is a Leading Global Private Markets Investor

We seek to deliver strong investment results for our clients by building attractive portfolios and investing in opportunities across the private markets. Our culture is rooted in the pursuit of investment insight and continuous innovation on behalf of clients.

- **Global Expertise:** Our team of over 400¹ dedicated professionals spans the globe, from the U.S. to Europe to Asia, bringing a world of insights to every investment decision.
- **Diverse Strategies:** Whether it's primary fund investments, secondary investments, direct equity co-investments, private credit, capital solutions or niche strategies like brand royalties and healthcare credit investments, we've got you covered.
- **Robust Deal Flow:** Our fully integrated approach supports a steady stream of high-quality opportunities, backed by rigorous due diligence.
- **Modern Portfolio Solutions:** In today's dynamic market, we believe alternative investing is more crucial than ever. Our collection of strategies aims to provide differentiated access to the private markets for a variety of investors, aligning with your investment needs.

¹ As of June 1, 2024.

Awards and ratings are not indicative of the past or future performance of any Neuberger Berman product or service, do not reflect the experiences of any NB client, and it should not be assumed that a similar investment experience would be had by any previous or existing client.

NB Private Markets did not pay a fee to participate.



WINNER



ESG Initiative of the Year – Santander

The ESG Initiative of the Year award is presented to the asset manager in the institutional or retail asset management space which has developed a strong ESG initiative in the past year and gained or maintained returns at the same time.

To qualify, entrants must be able to deliver investment opportunities that can grow client assets, while addressing global issues.

The winner of this year's award was Santander Asset Management (SAM).

The asset manager works as a single firm in 10 major markets across Europe, North and South America, with more than €226bn Assets under Management (AuM).

SAM sees Socially Responsible Investment (SRI) as a source of value for investments and is playing its part through its participation in initiatives such as the Principles for Responsible Investment or the Net Zero Asset Managers initiative.

In the UK, the asset manager offers best in class investment opportunities that span from European Article 8 funds to the Article 9 fund solution, through Santander Prosperity, a social investment fund formed in collaboration with (RED). Santander Prosperity is aimed at the social factor by investing in profitable and innovative companies that provide solutions to present and future challenges of our society, attract capital, generate value and generate a minimum of 30% of their revenues in activities linked to the United Nations' Sustainable

Development Goals.

(RED) is an organisation co-founded by Bono and Bobby Shriver to fight AIDS and the injustices that enable pandemics to thrive, through partnering with iconic brands worldwide and creating products and experiences that raise money for global health crises.

Santander Prosperity, social bias of its investment process is also reinforced by the donation of a share of its management fee to the Global Fund through its partnership with (RED) to help combat global health inequalities.

With an ageing population, and the challenges of food and water supplies, the asset manager's solution aims to address key challenges in health and wellbeing, food and nutrition and education and financial inclusion through investment in companies that are building a society for the future.

SAM believes that companies in the portfolio provide present and future solutions to those challenges, but also generate value for investors.

The investment portfolio is built on the basis of detailed analysis of the companies, not biased to a specific investment style, but focusing more on the firm's innovation, competitiveness and how it creates its value.

The portfolio remains flexible to facilitate investment companies with purpose and strong characteristics for sustainable profitability.

We would like to congratulate Santander

Asset Management on providing such a strong entry and for picking up the award at this year's event.





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28 November 2024

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Grosvenor Square

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WINNER

infrantry
Invest. Impact.

Infrastructure Manager of the Year - Infrantry

Infrastructure is now a major allocation of institutional and retail investor portfolios. In order to qualify the award, firms must show high levels of innovation and performance data against fund benchmarks across one, three, five and 10 years.

This year's winner, Infrantry, impressed judges with its AuM growth across the year, as well as its green impact and social and digital impact funds.

The asset management company, which was established in 2018, offers a broad investment scope from a sectoral and geographical point of view, a governance structure that guarantees the company's independence in the management of its assets as well as presenting strong alignment with investor and a founding principle of acting as a responsible investor, investing for positive impacts and reconciling financial and non-financial performance.

Infrantry has become one of the leading infrastructure managers in Europe, with a class-leading deployment of c. €2.5bn in 2023 in both debt and equity investments.

It has also raised more than €10.3bn of capital commitments, from internal and third-party institutional investors and has built one of the largest infrastructure debt teams in Europe with over 60 industry experts which draws on decades of collective experience in infrastructure.

In the past year, it has successfully closed the fundraising of its Senior IG Debt Third Vintage with

total commitments of €1.6bn, comfortably exceeding an initial target of €1.5bn.

Furthermore, it also went on to successively launch its fourth vintage and achieved a third close of €425m in December, already about a third of its fundraising target of €1.5bn.

Several investors in the new fund are recurring investors from previous vintages, testament of the trust that Infrantry has built with its investors over the years.

The judges were also impressed with how the new fund boasts improved financial and ESG objectives, in line with the attractive market conditions spectrum.

Moreover, its Green Impact and Social & Digital Impact funds are amongst the largest European infrastructure debt funds in the senior BB debt segment, with total cumulative commitments of close to €2bn in the strategy at final close in January 2023.

A hallmark of Infrantry's strategy, the judges noted that the fund has also benefited from rapid pace deployment, having already fully deployed their commitments

Truly differentiated, the funds have integrated ambitious sustainability objectives. The Green Impact Fund contributes to mitigating climate change aligning with the Paris Agreement, while the Social & Digital Impact Fund to the building of a more inclusive economy, supporting the European Digital Transformation framework.

Our congratulations go to Infrantry for their performance in this field.



WINNER



Alternatives Investment Provider of the Year - Argenta Private Capital Limited

Alternatives are an essential part of an asset manager's portfolio, and this award gives recognition to those firms showing a true skill for extracting value across the alternatives space for clients, whether in the institutional or retail asset management space. When it came to deciding a winner, the judges were impressed with Argenta Private Capital Limited's (APCL) strong capability in this field. This was APCL's first ever Wealth and Asset Management Award.

APCL is a Lloyd's member's agent, offering private investors the opportunity to underwrite (invest) in the Lloyd's of London insurance market. APCL's clients, who for 2023 are underwriting in excess of £4.3bn of premium, have benefitted from average annualised returns of more than 10% (while 2023 is forecast to produce returns of 22.2%* there may be years of losses). Lloyd's investors also benefit from the ability to use assets twice i.e. an existing investment portfolio can also support a Lloyd's underwriting portfolio, which generates returns with low correlation to traditional asset classes. A Lloyd's investment is also efficient from an Inheritance Tax perspective.

In recent years, APCL has witnessed an increasing number of professionals from a variety of backgrounds across its ultra-high-net-worth client base, having been introduced to

the opportunity by their respective bankers, wealth managers and advisors. Alongside these new clients, multiple generations of families remain as APCL clients, exemplifying APCL's ability to forge long term relationships and testament to the quality advice clients receive about their Lloyd's investment.

In order to tailor the investment opportunity to suit a client's risk appetite, APCL conducts extensive qualitative and quantitative research into the ever-evolving market for its clients and prospects, to ensure that it can build its investment vehicles to suit a range of individual circumstances, whether in a risk, tax or regulatory perspective. APCL explained that they had recently set up new and innovative structures to access the Lloyd's market, and had further sought to provide a best in class service by merging the tax and corporate services business, to provide clients with end-to-end market leading research, analysis and investment advice with specialist tax and accounting services, making investing in Lloyd's much easier for its clients.

We would like to congratulate APCL on winning this award and for such a strong performance in 2023.



**Lloyd's is an investment that works on a three-year accounting basis meaning that the forecast returns will be subject to change.*

Past performance is not an indication of future returns.

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