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EUROMONEY
PRIVATE BANKING
AWARDS 2026

Best For Succession Planning

The **private bank** at a global, regional and country/territory level that has excelled in facilitating seamless wealth and business transitions of its clientele from one generation to the next during the period under review. The private bank will also have demonstrated an expertise in complex estate planning, trust structures, family governance and tax efficiency, while also providing education and support for multi-generational wealth preservation. Applicants should be able to showcase their ability to co-ordinate multi-disciplinary teams, navigate multiple jurisdictions and implement sophisticated wealth structures.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks or wealth managers

Key Performance Indicators:

- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio

Assessment Criteria:

- Examples of success in executing complex family wealth transfers
- Evidence of how succession planning services have led to higher wallet share
- Evidence of sophisticated offering across tax planning, trust, and family governance solutions
- Examples of co-ordination with third-party service providers

- Evidence of dedicated and experienced wealth and succession planning personnel

- Select the category you wish to submit for and provide basic information about your entry here.
- You may make entries at a country/territory, regional and a global level.
- You may make separate submissions for all countries and regions where your bank has a physical presence.

Guidelines

- If you have any questions about the entry process, or research methodology or criteria, please refer to our [research guidelines](#)

Contacts

- For all queries related to participation, please contact [Alex Pang](#)
- For any questions about the awards research, please contact [Ben Naylor](#)
- For any commercial enquiries, please contact [Peter York](#)

Name of nominee (company or individual)

Geography

	▼
Global	
Regional	
National	

How did you hear about Euromoney's Private Banking Awards? (optional)

	▼
Social media	
Marketing Communications	
Euromoney Contact/Referral	
Organic (Google, Website, etc.)	
Other (please specify)	

Your Entry

- This entry form is your opportunity to showcase your institution's achievements within the review period (**1 July 2024 to 30 June 2025**).
- In each entry form, there are required financial metrics for your business and the category in addition to qualitative text boxes. All of these align to the criteria Euromoney will use to evaluate entrants and are crucial to our research process.

- Entrants must validate with evidence any improvements their business has made in terms of operations and products during the period under review. Such evidence includes key metrics related to their business (such as assets under management, net new assets and revenues), as well as key metrics applicable to specific categories (such as penetration rates of product lines and trading volumes of investments).
- Entrants may also attach supporting documentation for their submissions. The scoring frameworks used by Euromoney's research team use a matrix that awards more points to those entries that provide the data we have requested.

Financial Metrics

- Please provide all requested data within the prescribed timeframe and currency (where applicable). **Data provided should be relevant to the geographic region in which you are submitting i.e. your institution's global AUM if you are submitting for a global award, or regional AUM if you are submitting for a regional award.**
- Euromoney will use this data to benchmark your business against its peers.
- Euromoney will assess your performance based on growth and outright scale of the key metrics you provide. An entrant's strategy will be taken into consideration when evaluating these metrics.
- **Assets Under Management (AUM):** Total market value of actively-managed client assets, excluding assets under custody or administration.
- **Revenue:** Total income generated from management and advisory fees, transaction commissions, loan spreads and fees from other private banking services.
- **Net New Assets (NNA):** Total client money inflows minus withdrawals, and excluding market performance.
- **Return on Assets (ROA):** Annual net income divided by AUM and expressed in basis points.
- **Cost-To-Income Ratio:** Total operating expenses divided by total operating income, and expressed as a percentage.
- **HNW assets:** Total AUM derived from those clients classified as high-net-worth.
- **UHNW+ assets:** Total AUM derived from those clients classified as ultra-high-net-worth.
- **RM Headcount:** Number of relationship managers, or equivalent role.
- **RM-To-Client Ratio:** Average number of clients assigned to each relationship manager, or equivalent role.

Performance metrics specific to category and geography of award (optional)

	Performance metric	H1 2024	End 2024	H1 2025
1	AUM (USD, bn)			
2	Net New Money (USD, bn)			
3	Revenue (USD, bn)			
4	Return on Assets (bps)			
5	Cost-to-income ratio (%)			
6	HNW client assets (USD, bn)			
7	UHNW+ client assets (USD, bn)			
8	Relationship manager headcount			
9	Relationship manager to client ratio			

Please provide all data indicated below within the prescribed timeframe and currency (where applicable).

Euromoney will use this data to benchmark your business against its peers.

Euromoney will assess performance based on growth and outright scale. Entrants' strategy will be taken into consideration when evaluating these metrics.

If the data is confidential, please indicate this in the relevant cell.

If you would prefer to share these metrics in a table, please upload it as an attachment in the relevant place in the portal.

Strategy: (optional)

Strategy: Provide evidence of successful execution of your succession planning/next generation strategy during the period under review.

Case Studies: (optional)

Case Studies: Provide relevant case studies that underscored your succession planning/next generation capabilities during the period under review.

Products and Solutions: (optional)

Products and Solutions: Provide evidence of a differentiated succession planning/next generation product and solutions suite during the period under review.

Entrants should aim to provide supporting documentation – such as strategy decks, performance reports, investor presentations, data tables and charts, and qualitative overviews – to support their claims and illustrate their growth and performance over the review period. All data should be dated.

Entries can include confidential information that we can use to justify the granting of an award. Anything clearly marked confidential will not be used outside of decision-making. Euromoney may use information not marked confidential in awards write-ups or research reports.

We accept Word, PDF, Excel and PowerPoint documents.