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EUROMONEY
PRIVATE BANKING
AWARDS 2026

Best Insurance Provider for Wealth Management

This award honours a **life insurance product manufacturer or broker** at a global and regional level that has demonstrated excellence in distributing insurance-based wealth planning solutions through the private wealth channel to high-net-worth and ultra-high-net-worth clients during the period under review. The winner will have distinguished itself through innovative product development tailored for wealth planning needs, strong distribution partnerships with the wealth channel, and expertise and support in devising complex structures.

Geographic Levels Awarded at: Global and regional

Eligible Entrants: Life insurance providers and brokers

Key Performance Indicators:

- Average premium per policy
- U/HNW client renewal rate

Assessment Criteria:

- Evidence of rising penetration among private banks and wealth managers
- Evidence and examples of product innovation and wealth planning integration
- Evidence and examples of client satisfaction and retention
- Evidence of rising average premium per policy
- Evidence and examples of specialised underwriting capabilities and bespoke policy structuring

- 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

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.

Strategy: (optional)

Strategy: Describe your differentiated strategy for targeting private banks wealth managers to distribute your solutions during the period under awards review.

Client Flows: (optional)

Client Flows: Provide evidence of how your solutions attracted strong client inflows from private banks and wealth managers during the period under awards review.

Products and Solutions: (optional)

Products and Solutions: Provide evidence and examples of how your solutions benefited the operational performance of private banks and wealth managers in a secure, risk-conscious manner during the awards review period.

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.