

From Purpose to Performance: Edmond de Rothschild's Wealth Planning in Action

How do you cultivate a culture that consistently drives excellence and high performance?

At Edmond de Rothschild, we foster excellence through three core pillars: purpose, accountability, and empowerment. Our long-term, conviction-driven investment philosophy guides teams to create sustainable value for clients and the real economy.

Internally, we often speak about "*faire du Edmond*": high standards, strong ownership and long-term thinking, combined with an uncompromising focus on client outcomes. This mindset is embedded in how we recruit, develop and evaluate our people.

Our Wealth Planning team is recognised in Europe for its technical expertise and innovative approach. With strong cohesion, complementary skills, and a balanced mix of experience and gender, we combine fresh perspectives with seasoned judgment. This synergy enables us to consistently deliver outstanding results for our clients.

How does Edmond de Rothschild serve clients with purpose and care?

At Edmond de Rothschild, our conviction is to "*faire œuvre utile*" which entails serving a meaningful purpose. This mindset, rooted in a centuries old corporate culture, guides the way we support our clients, especially in an environment where crises and uncertainties are becoming more frequent.

First, every client can easily access our full range of in house services – private banking, wealth planners, and other experts – and tailor their investment solutions with a high degree of flexibility. Our strategy prioritises client experience, featuring personalized guidance over time, enhanced by digital and educational tools to efficiently navigate legal and tax concepts.

Second, *intuitu personae* is at the heart of our model. We make sure there is always someone who truly matches the client's personality, needs and expectations. This allows us to address not only technical questions, but also doubts, concerns and long term family projects, with empathy and continuity.

What role has collaboration played in your success?

Collaboration is a differentiator for us.

At Edmond de Rothschild, our wealth planning business is organised as a network of 34 planners across 9 European countries. This network shares expertise and local knowledge, enabling us to respond quickly to complex cross-border situations and provide consistent advice to international clients.

Collaboration with other departments is central to creating client value and driving innovation. Recent projects focus on vulnerable clients, client experience and family relationships, governance, and a "luxury and disruptive" publication all designed to enhance efficiency and improve client proximity.

What key challenges do you see in wealth management over the next five years, and how are you preparing for them?

From my perspective as Group Head of Wealth Planning, the next five years will be shaped by several key challenges, and we are actively positioning our business to address them.

The regulatory and tax environment is becoming increasingly complex, particularly for internationally mobile clients. Second, we are entering an unprecedented phase of intergenerational wealth transfer, requiring earlier, structured planning and stronger family governance. Third, younger wealth profiles with different needs and expectations are emerging. Finally, the implementation of AI in wealth planning will be transformative. Optimising tailor-made support tools through our internal database and managing data ownership will be critical.

We recruit empathetic wealth planners who adapt strategies with insight, combining technology and human connection at the heart of our services.



Yvan Vaillant
Head of Group Wealth Planning
Edmond de Rothschild



Winner

- **Private Bank - International Wealth Planning Team**
- **International Clients Team**
- **Domestic Clients Team**