

PRESS RELEASE

Experience, Emergence and Expansion at Scorpio Partnership

LONDON – Pioneering global wealth management insight and business consultancy firm Scorpio Partnership is pleased to announce the appointment of three experienced senior executives to the team. Their appointments are part of the strategic growth plans of Scorpio Partnership which includes the recent rebranding of the firm to “What Wealth Needs Next” and the development of a business presence in Switzerland in 2010 and an aim to also expand in Asia in 2011.

“To support our exciting project ideas in wealth we are taking Scorpio Partnership to the next level,” said Sebastian Dovey, Managing Partner, adding that the rebranding has helped to spotlight the successful business processes Scorpio Partnership undertakes on assignments. “We have typically pushed our clients and the projects we have done for them into the limelight but now for the next stage of our plans we shall be on the front foot much more,” Dovey said.

Caroline Burkart, formerly a holder of senior positions at Credit Suisse Private Banking including the head of the Middle East market team in London over a ten year period, has worked with Scorpio Partnership since 2006 and has now been promoted to Executive Director – a new role. Dr. Walter H. Ramboisek was previously a Managing Director at UBS Wealth Management where he worked for over two decades in various senior positions including strategy development, leadership and education and takes on a new role as Senior Project Consultant in Zurich. Bill Yelverton, a seasoned senior client relationship manager at the likes of Merrill Lynch and Prudential as well as search firm Norman Broadbent, joins as a Senior Project Consultant in London.

“Scorpio Partnership is now a globally recognised strategist and business advisor and this expertise will boost our implementation skills,” commented Catherine Tillotson, a Founding Partner of the firm. Tillotson noted that the rebranding work, conducted by partner firm Goosebumps, has already been having a market impact. “The new identity has just clicked with our institutional clients. They now recognise we are committed to taking them even further into acquiring new clients. In effect, we can go from insight all the way through to new client business.”

Scorpio Partnership’s full complement now numbers 15 professionals focused on wealth management assignments across the globe. More than 50% of the firm’s business is regularly in Switzerland and Asia, which is backing the interest in regional expansion. “For a very long time we have had at least 20% of our work in Asia and often as much as 50% of our work is in emerging markets in general including client and market insight projects. We believe there is great scope to now bring our solutions to even more clients in these regions,” said Dovey adding that the business is exploring options to establish a committed presence in Singapore within 18 months.

The firm was started in 1998 and has worked on more than 300 assignments across the globe in over 35 countries for over 125 institutions. The client institutions have included private banks, wealth managers, investment banks, asset managers, insurers, private equity firms, investment research firms, technology firms, family offices, royalty, charities and philanthropists. Several of the Scorpio Partnership projects for clients have won international industry awards for innovation, market positioning, new product development and campaign plans.

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FOR FURTHER INFORMATION PLEASE CONTACT:

Scorpio Partnership
Sebastian Dovey, Managing Partner
+44 (0)20 7811 0123
seb@scorpiopartnership.com

Catherine Tillotson, Managing Partner
+44 (0)20 7811 0122
cath@scorpiopartnership.com

NOTES TO EDITORS

About Scorpio Partnership

Scorpio Partnership is the leading insight and business consultancy to the global wealth industry.

The firm specialises in understanding the wealthy and the financial institutions they interact with. We have developed four transformational disciplines – **SEEK**, **THINK**, **SHAPE** and **CREATE** – each designed to enable business leaders to strategically assess, plan and drive growth. The solutions Scorpio Partnership develops regularly win awards for its institutional clients and help them financially profit.

Our disciplined teams leverage expertise in:

SEEK

- Client research
- Advisor research
- Market mapping
- Company/Intermediary research
- Brand identity audits

THINK

- Product/Service development
- Business case development
- Concept solutions
- M&A diligence
- Brand identity development

SHAPE

- Market entry solutions
- Media and Event solutions
- Training and Education solutions
- Sales & Marketing campaigns
- Brand identity solutions

CREATE

- Campaign management
- Change management
- Strategic marketing
- M&A implementation
- Specialist consulting

Scorpio Partnership has been voted best global consultancy to the wealth management industry for the three consecutive years*. The firm is independent and owned by management.

For more information go to www.scorpiopartnership.com

*Wealth Briefing