


Lombard Odier's EAM Head for Asia on their Dedicated Proposition for the Region's Independent Wealth Community



In a presentation at the recent Hubbis Investment Forum in Hong Kong, Emmanuel Guillaume, Head of EAM, Asia Pacific, turned a spotlight on the rich history, strengths, and future aspirations of Lombard Odier, a family-owned Swiss bank. The Bank has a history spanning over two centuries as a stable but also innovative investment, custody and operational platform partner for independent wealth firms. From its financial strengths to its multi-faceted and comprehensive range of services for EAMs, as well as the bank's pioneering efforts in sustainability, Emmanuel painted a comprehensive picture of a financial institution that has successfully navigated the tumultuous waters of over 40 financial crises and emerged stronger each time, and is therefore a stable and totally committed partner for the independent wealth community. In particular, he explained how they have a dedicated EAM team in Singapore serving the region, and he reported how this team also works with the bank's other dedicated EAM teams globally to provide a seamless service for clients.

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EMMANUEL GUILLAUME
Lombard Odier

Emmanuel began by

providing a brief introduction to Lombard Odier, which he said is a Swiss bank created all the way back in 1796, and still family-owned to this day. Highlighting the bank's weathering of over 40 financial crises in its long history, Emmanuel

very liquid, with a 30% Tier one ratio. "This is well in excess of what the regulators require, and gives us a Fitch rating of AA-, which for a bank group of our size is the highest rating possible," he reported.

Global Presence and Strategic Alliances

Emmanuel discussed Lombard Odier's international presence, with offices in 25 locations globally, including in Asian hubs such as Singapore, Hong Kong, and Tokyo. He detailed the bank's expansion in the Asia-Pacific region through a series of strategic alliances in various countries, including Kasikornbank in Thailand and Mizuho Financial Group in Japan. "These strategic alliances allow us to link up with well-reputed domestic financial

sustainability, reporting that it is very much central to their DNA. He said Lombard Odier was an early adopter of formal ESG rating methodologies, way back in 1997, long before ESG became such a mainstream concept. In fact, the bank became the first global wealth and asset manager to obtain the B Corp certification, in 2019, he noted.

Engaging with EAMs

The bank is also dedicated to the independent wealth management community, working with and for External Asset Managers (EAMs), Multi-Family Offices (MFOs) and others. "We have focused on these clients for some 36 years, this is a strategic market for us, and today we are offering clients nine booking centres across the world. We are

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explained that their ability to survive and prosper for so long was founded on the ability to "re-create, rethink ourselves, and navigate different operating environments". markets of choice for them."

Financial Strength

On the subject of the bank's capitalisation, he explained that the balance sheet is both robust in terms of capitalisation and also

institutions in these countries and to access their onshore clients who need the investment expertise of Lombard Odier in the offshore wealth management markets, thereby significantly enhancing our distribution capabilities, and providing a service to those partners and their clients."

Emmanuel also highlighted the bank's commitment to

more than a custodian bank; we deliver long-term support through our dedicated EAM teams across the globe, giving our EAM customers access to a wide range of quality services, products and dedicated specialists."

He elaborated on the proposition: "The private clients of our EAMs, MFOs and others we work with end up with the best of both worlds. They will be patrons of a

well-capitalised and independently owned private bank. They will benefit from high-quality, front-to-back banking services. All this while maintaining their relationships with their chosen independent wealth firm.”

He pointed to their Singapore-based dedicated EAM team for Asia, which delivers expertise first on Singapore, Hong Kong and Australia, but also more broadly on other Asian markets where, for example, they have their established partnerships.

Emmanuel explained that the team has a very diverse set of Asian and European language skills to cater to customers. And the team has extensive knowledge of specific structures and vehicles such as the Trust, Private Investment Company (PIC) or Australian Superannuation Funds. He said they offer industry-leading access to investment solutions, asset managers and specialist funds, including private equity.

Additionally, the bank offers support in key wealth and legacy planning areas through their Lombard Odier Family Services team. Speaking about some of the challenges facing EAMs in Asia, he identified regulations, technological innovation, evolving client needs and expectations, the emergence of next-generation and younger clients, the need for multiple booking centres, growing demand for bespoke offerings, the increasing need for agility and innovation, and a trend towards industry consolidation as costs rise and as scale becomes more important.



But he also reiterated the very considerable opportunities stemming from the EAM model's independent and agile nature.

Future-Ready Technological Solutions

Regarding future-ready solutions, Emmanuel stressed the need for the latest technologies and digital solutions to optimise and automate processes such as client onboarding, investment selection (the bank offers open architecture access), risk management, and reporting. He emphasised Lombard Odier's G2, which is a smart in-house system to optimise the portfolio management process, and referred to their upcoming GX enhanced Portfolio Management system, which Lombard Odier reports will enable them to maintain a competitive advantage by continuing to offer

their clients the best technology in the market.

In a nutshell

In concluding his presentation, Emmanuel emphasised Lombard Odier's unique positioning, combining both stability and entrepreneurial spirit, and their relentless drive to provide the best solutions and service to clients. Emmanuel noted that despite its boutique nature, Lombard Odier is stable and one of the world's best-capitalised institutions. They offer a state-of-the-art, in-house developed portfolio management system that grants users full autonomy. This system can manage assets across 9 global centres through a unified platform. Lombard Odier focuses on transparent reporting and supports multi-family offices and EAMs throughout their journey, ensuring top-notch service and enhanced decision-making capabilities. ■

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