

# Wealth Management Competitor Tracker, May 2010

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## Abstracts

### Introduction

This monthly tracker covers product innovation, customer targeting, M&A, partnerships, organic growth, and staffing activity globally in the wealth management space.

### Reasons to Purchase

- Track the strategies announced by 50+ of your key competitors.
- Assess which geographies and strategic areas are seeing the most activity.

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Introduction

The Wealth Management Competitor Tracker provides both one month and 12 month views of developments

Each month, Datamonitor tracks the most relevant announcements from 55 competitors. Datamonitor's Wealth Management Team provides analysis of the key developments at both one month and 12 month intervals.

A fully searchable database of the past 12 months of developments is also delivered alongside the report.

Key Trends and Developments in May

There were some notable developments within the wealth management industry during May.

Hinduja Group acquires KBL European Private Bankers

Société Générale Private Banking partners with Komer?ní banka

In May, the wealth management market continued its spate of activity.

There were a total of 28 competitor developments in May.

M&A activities were predominant in the wealth market in May.

Competitor activity remained strong in Europe and North America in May.

Product Innovation and Customer Targeting

Bank of America

US Trust initiates an advertising campaign for affluent customers

Barclays

Barclays Wealth introduces new FTSE returns product

Barclays Wealth reissues Emerging Markets Optimiser

Barclays Wealth re-launches its Defined Returns Plan

Barclays Wealth reissues Super Tracker with two options

Morgan Stanley

Morgan Stanley organizes a conference for the lesbian, gay, bisexual and transgender (LGBT) community

National Australia Bank

MLC Insurance introduces an income protection insurance for affluent customers

M&A, Partnerships and Organic Growth

ABN Amro

ABN AMRO opens a new branch in New York to cover three time zones

Australia and New Zealand Bank

ANZ launches a new sub-branch in Japan

ANZ receives approval to establish Chongqing branch

Barclays

Barclays Wealth expands its presence in Italy

Banco Bilbao Vizcaya Argentaria

BBVA strengthens its presence in Uruguay with the purchase of Crédito Uruguay Banco

HSBC

HSBC opens a new branch in Virginia

JPMorgan Chase

Chase continues to expand in California

KBC

Hinduja Group acquires KBL European Private Bankers

Great Western Bank

Great Western Bank acquires 10 F&M Bank-Iowa branches

Sarasin

Bank Sarasin closes its Spanish subsidiary

Société Générale

Société Générale Private Banking partners with Komer?ní banka

Société Générale Private Banking opens regional centers outside Paris

UBS

UBS plans to acquire Link Investimentos

Staffing

Barclays

Barclays Wealth expands its team in Africa

Citigroup

Citigroup appoints Rudolf Hitsch

Deutsche Bank

Deutsche Bank announces appointments within its North Asia wealth planning team

## **HSBC**

HSBC expands premier business team in Washington

Mellon Financial Corporation

BNY Mellon appoints head of wealth management unit

Morgan Stanley

Morgan Stanley Private Wealth Management expands team for Latin American markets

Sal. Oppenheim

Sal. Oppenheim appoints Gregor Broschinski

Sarasin

Sarasin appoints new head of Geneva branch

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