

Wealth Management Competitor Tracker, November 2009

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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 57 competitors. Datamonitor's Wealth Management Team provides analysis of the key developments at both the one month and 12 month level

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

Key Trends and Developments in November

There were a few notable developments within the wealth management industry during November

ANZ completes acquisition of RBS in Philippines

Commerzbank announces sale of Privatinvest Bank to Zürcher Kantonalbank

Deutsche Bank prepares to acquire Sal. Oppenheim

In November, activity in the wealth management space was stable

There were a total of 20 competitor developments in November

Staffing changes has been the leading category over the year however M&A activity is expected to recovery in the near future

European countries saw the largest share of wealth management activity for the month

Product Innovation and Customer Targeting

Citibank

Citi Turkey offers Citigold Package to doctors

Sarasin

Sarasin Group launches a comprehensive Islamic wealth management offering

M&A, Partnerships and Organic Growth

ABN AMRO

Schroders partners with ABN AMRO to distribute its funds throughout the Netherlands

ANZ

ANZ completes acquisition of RBS in Philippines

Bank of America

Merrill Lynch Global Wealth Management partners with Bank of America on retirement

solution

Commerzbank

Commerzbank announces sale of Privatinvest Bank to Zürcher Kantonalbank

Deutsche Bank

Deutsche Bank prepares to acquire Sal. Oppenheim

Fortis

Fidelity International takes interest in Fortis

Sarasin

Bank Sarasin plans to acquire stake in NZB Holding

Soci?t? G?n?rale

Soci?t? G?n?rale Group opens a wealth management office in Bahrain

Vontobel

Vontobel concentrates on Swiss private clients

Staffing

Bank of America

Bank of America Merrill Lynch announces Tony Sciarrino as Orange County commercial banking executive

Barclays

Barclays Wealth appoints David Semaya as new head of UK & Ireland Private Bank

Citi

Citi Private Bank appoints new managing director and head of investments for North America

Credit Suisse

Credit Suisse appoints CEO in the Nordic region

Morgan Stanley

Morgan Stanley Private Wealth Management appoints investment professionals to expand in Latin America

Northern Trust

Northern Trust appoints managing director to lead regional wealth management services

Soci?t? G?n?rale

SG Private Banking strengthens its senior management team in the Middle East

UBS

UBS appoints Robert J. McCann as CEO of wealth management Americas

Vontobel

Vontobel Germany announces Frank Wieser as the managing director and the head of private banking

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Methodology

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