

Wealth Management Competitor Tracker, October 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 October

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

Commerzbank concludes sale of Swiss subsidiary

Commerzbank disposes Dresdner Van Moer Courtens and the Belgian branch of Commerzbank

In October, activity in the wealth management market fell slightly

There were a total of 20 competitor developments in October

Since the start of the year, staffing changes have been the leading category for wealth management activity

European and North American countries saw the largest shares of wealth management activity

Product Innovation and Customer Targeting

Bank of America

Bank of America re-launches the Merrill Lynch Wealth Management Brand

Barclays Wealth

Barclays launches BARXdirect for sophisticated investors

Citibank

Citibank announces introduction of fee-only investment advisory services

Credit Suisse

Credit Suisse introduces euro-based FX Fund for affluent clients

M&A, Partnerships and Organic Growth

ABN AMRO

ABN AMRO demerger documentation filed with the Amsterdam chamber of commerce
Bank of America
Bank of America plans to sell First Republic Bank
Barclays Wealth
Barclays Wealth expands its presence in the US
Commerzbank
Commerzbank concludes sale of Swiss subsidiary
Commerzbank disposes Dresdner Van Moer Courtens and the Belgian branch of
Commerzbank
Citibank
Citigold partners with Samsung Malaysia to reach out to the affluent segment
Goldman Sachs
Goldman Sachs launches onshore private wealth management platform in Brazil
Staffing

ANZ

ANZ appoints Phillips Chronican as CEO of Australia
Bank of America
Bank of America appoints Andrew M. Sieg as managing director and the head of global
wealth
Barclays
Oliver Gregson appointed as head of investment advisory at Barclays
Barclays Wealth appoints director in Bangalore
Bessemer Trust
Bessemer Trust appoints Michael A. Marquez as managing director
Deutsche Bank
Martin Bartyzal to be appointed as chief country officer for Czech Republic at Deutsche
Bank
Credit Suisse
Fran?ois Roussely appointed as vice chairman of Credit Suisse in Europe
Credit Agricole
Appointment of deputy CEO at Banque de Gestion Priv?e Indosuez

UBS

UBS appoints Robert J. McCann as CEO, Wealth Management Americas & Member of

UBS group executive board

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Datamonitor consulting

Disclaimer

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