



# Private Banking: Building a Culture of Excellence

By Boris F. J. Collardi

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**Private Banking: Building a Culture of Excellence** By Boris F. J. Collardi

**An insightful overview of the keys to world-class client service in the private banking sector**

As the number of wealthy individuals around the world increases, private banking and wealth management companies have grown to keep pace. After the fast growth the long term success is predicated on both winning *and* keeping clients, making a client-centric model a must. *Private Banking: Building a Culture of Excellence* provides a clear, easy-to-follow guide to building a committed base, written by an industry expert.

Presenting an overview of the elements required to build a successful and client-focused private bank that delivers the kind of care and excellence wealthy clients demand, the book even includes real-life examples for a better understanding of concepts and, to help you achieve your goal.

- Outlines how to implement a practical strategy for success in the growing private banking sector
- Explores the key drivers in the private banking industry as well as the most recent developments in the environment to help you stay on top of customer demands
- Includes case studies and other resources to show the keys to private banking done right in action

*Private Banking* provides useful, hands-on advice for building a strong, lasting business in the private banking sector.

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**Private Banking: Building a Culture of Excellence By Boris F. J. Collardi Bibliography**

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### Editorial Review

#### From the Inside Flap

The financial industry has entered a phase of radical change, and the challenges facing private banking—from volatile markets to new regulatory regimes—have contributed to a sense of urgency within this arena. While the road ahead may not be easy, there are still vast opportunities for private banks to excel in this competitive environment.

Written by Boris Collardi, one of today's top Swiss private banking professionals, *Private Banking* looks at this discipline from a global perspective. Collardi provides a comprehensive overview of the elements that play a critical role in the private banking sector, illustrating how they may be aligned to serve a single objective: achieving excellence by keeping the client at the center of focus for all activities. Collardi also highlights how taking modern practices and ideas into account, while continuing to respect established traditions, can allow you to thrive under various conditions.

Engaging and informative, this book goes beyond academic theory to provide insights drawn from the author's real-life experiences. Topics touched upon include:

- The opportunities and challenges posed by the four main factors driving the industry—the markets, the regulatory environment, clients, and competition
- Finding the right organisation and operational strategy
- Determining client segments that should be your main focus and tailoring solutions to best serve them
- Issues relating to the evolution and use of branding by private banks
- Attracting, developing, and retaining top talent
- Measuring and managing performance

Today's private banking business demands a high level of expertise in many different areas of competence and a professionalism that must exceed the already significant client expectations. In order to achieve success in this endeavour, you must first achieve excellence. *Private Banking* will show you how.

#### From the Back Cover

#### Praise for *Private Banking*

"This book is a must-read for a new generation of CEOs in the private banking industry. Boris Collardi was catapulted into the role of the CEO of a company with a strong tradition as a formerly family-run business. In this role, he forcefully developed the ever more important footprint in the emerging markets. He also addressed the constantly changing services and product needs of the clients and all this in the midst of a prolonged financial crisis and an increasing regulatory push with which the industry had to cope.

"The various chapters of this book give firsthand insight into why he was successful in managing this tremendous amount of change in a very complex environment. Being truly multicultural and having a strong sense of empathic leadership helped him in pulling through."

—**Raymond J. Baer**, Honorary Chairman, Julius Baer Group Ltd.

"*Private Banking* is just the best available high-class textbook for designing and implementing sophisticated business strategies in the private bank or wealth management institution. It is aimed at both business experts and banking students. Like no other textbook I know, it provides food for thought as well as practical decision support for the design of private banking business strategies in today's extremely challenging business environment. The author, CEO of one of the most famous Swiss private banks, highly succeeds in sketching a precisely defined and excellently written framework for excellence in world class private banking."

—**Beat Bernet**, Professor of Banking, University of St. Gallen, Switzerland and former president/board member of stock listed banks

"Swiss private bankers seldom lift the lid on their calling before the end of their careers, so Boris Collardi's candour is to be welcomed. The Chief Executive of Bank Julius Baer provides a behind-the-scenes glimpse of what makes a Swiss private bank tick and the factors influencing key decisions amid massive shifts in the business. That he does not reveal more is explained by Mr. Collardi's continuing responsibilities. But what he does provide is a comprehensive discussion of the success factors for a private bank today."

—**Haig Simonian**, Switzerland & Austria correspondent, *Financial Times*

"This is a book written with passion by an incumbent Chief Executive Officer managing a large Swiss private bank looking at issues from a global perspective. Based on his personal experience of transforming Bank Julius Baer, author Boris Collardi offers a practical framework for achieving excellence in private banking. The book contains his profound views on the formulation and implementation of private banking strategies that meet the challenges of the industry. I recommend this book to all aspiring and seasoned wealth managers who would gain invaluable insights into the perplexing issues of managing a private bank in the current difficult banking environment."

—**Professor Francis Koh, PhD**, Deputy Dean, Lee Kong Chian School of Business, Singapore Management University

"With *Private Banking*, this is the first time we have a book that covers the entire private banking value chain. Boris Collardi does an excellent job explaining the challenges of our industry and providing suggestions by using both his personal CEO experience and some of the most insightful studies analysing our industry. This book is very well structured and can be useful to anybody interested in the private banking industry—from the young university graduate to the seasoned banker."

—**Patrick Odier**, Chairman, Swiss Banking Association

## About the Author

**BORIS F.J. COLLARDI** is Chief Executive Officer of Julius Baer Group Ltd., the leading pure-play private banking group, based in Switzerland. He oversees all operational issues on both a national and international scale. Before joining Julius Baer in 2006, Collardi spent twelve years with Credit Suisse and contributed significantly to its successful build-up and the expansion of its private banking business in both Europe and Asia. During his years with Credit Suisse, he attained the positions of chief financial officer and head of the corporate centre within CS Private Banking. Collardi combines extensive leadership experience with proven expertise in the successful implementation of ambitious strategic projects. His international work experience stems from six years spent in Asia and the UK.

## Users Review

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**Robert Hay:**

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