**Best Digital Proposition**

Harvinder Virdi

Senior Product Marketing Manager

Morningstar Wealth

harvinder.virdi@morningstar.com

Entry for the International Adviser Global Financial Services Awards 2025
Category: Best Digital Proposition Entry
Completed by Helena Hill, Marketing Director, Morningstar Wealth

[MW-International-Adviser-Best-Digital-Proposition-final-supporting-doc.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F05%2FMW-International-Adviser-Best-Digital-Proposition-final-supporting-doc.pdf&form-id=29&field-id=18&hash=733fe46e750dc4b67ab2862bdb6081ffb1174f1f8072705a76e50433df96cd27)

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Angela Gregory

Communications Executive

RL360

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[Best-Digital-Proposition-RL360.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FBest-Digital-Proposition-RL360.docx&form-id=29&field-id=18&hash=d3e32db97ad265588b8d23a4a4796606120fcade2a739a892d70de860028d75a)

**Best ESG/Sustainability Fund**

Siobhan Mitten

Senior Communications Manager

LGT Wealth Management

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At LGT Wealth Management, we have committed to integrating sustainability into every aspect of our business decisions by 2030, guided by a clear set of strategic goals. LGT has already made significant strides towards these objectives, including our pioneering proposition, the Sustainable Portfolio Service and, on the operational front, our ambitious targets for the firm to achieve net zero by 2030.
Our sustainable investment strategy spans a range of services including a sustainable model portfolio service for financial advisers to access on behalf of their clients, a multi-manager fund available across multiple platforms and bespoke portfolios tailored to the needs of individual clients. This was first developed in November 2018 and now has over £1billion in assets. Our sustainable strategy is underpinned by our four sustainable pillars – circular economy, environmental action, health and wellbeing and inclusion and equity, in which we look for company alignment through both...

[LGT-WM-Sustainability-360-Report-Fifth-Edition.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F05%2FLGT-WM-Sustainability-360-Report-Fifth-Edition.pdf&form-id=37&field-id=18&hash=09bf5e783d7dce5ad9ac39db03313934cd9adf69140f5fc1885be38043befeba)

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Madhu Kalia

Associate Director - Press & IW

Rathbones Group PLC

madhu.kalia@rathbones.com

[Rathbone-SICAV-Ethical-Bond-Fund\_Best-ESG\_Sustainability-Fund-Entry-\_May-2025.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F05%2FRathbone-SICAV-Ethical-Bond-Fund_Best-ESG_Sustainability-Fund-Entry-_May-2025.docx&form-id=37&field-id=18&hash=9acd6e5303ef7546f63231b0d3b46fd9055f2cc609c3ecbc908e65b6677ef4bd)

**Best Family Office**

Adam Riddell

Director

Crestbridge Family Office Services

adam@crystalpr.co.uk

Submitting on behalf of Crestbridge Family Office Services.

Could we stress that they would like to enter only if the category is 'Best Family Office Services' - they are not a family office themselves.

[IA-Awards-2025-submission-Crestbridge-FOS-final.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F05%2FIA-Awards-2025-submission-Crestbridge-FOS-final.docx&form-id=41&field-id=18&hash=70ab11bb571c6060970180a814732597643c8df70dce7f157b347d48d24cb400)

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**Best International Pension Provider**

Harvinder Virdi

Senior Product Marketing Manager

Morningstar Wealth

harvinder.virdi@morningstar.com

Entry for the International Adviser Global Financial Services Awards 2025
Category: Outstanding Individual Contribution
Mark Sanderson, Managing Director at Morningstar Wealth
Completed by Helena Hill, Marketing Director, Morningstar Wealth

[MW-International-Outstanding-Indv-Contibution-Mark-Sanderson-updated.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F05%2FMW-International-Outstanding-Indv-Contibution-Mark-Sanderson-updated.pdf&form-id=43&field-id=18&hash=87144786a1051075a64b2ca2d02c176316b4df431dd951cc73dc1d50350a7f43)

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Angela Gregory

Communications Executive

IFGL Pensions

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[Best-International-Pension-Provider-IFGL-Pensions.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FBest-International-Pension-Provider-IFGL-Pensions.docx&form-id=43&field-id=18&hash=5aa93a5cc226ddbfdd76993a7421734bbbfea0d8674e24abcd95500693ce171e)

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Csilla Balint

Group Head of Marketing

Momentum Pensions

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[Momentum-Pensions-Best-International-Pension-Provider-Entry.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FMomentum-Pensions-Best-International-Pension-Provider-Entry.pdf&form-id=43&field-id=18&hash=92cafa6b6623566f6ad805adb1336feaf69d469578e4667e17f0dc0f90ef83d0)

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Rex Cowley

Director

Overseas Trust and Pension

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Attached in the statement as to why I believe Overseas Trust and Pension we should be awarded the accolade of Best International Pension Provider.

[IA-AWARDS.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FIA-AWARDS.docx&form-id=43&field-id=18&hash=04b82aa1288cebfebb30eb82a7cb0c0df8ee1672e4779c4e0375d24d2b26e021)

**Best International Portfolio Bond**

Lindsay Paris

Media & Communications Manager

Investors Trust

lparis@investors-trust.com

Access Portfolio is a flexible, transparent solution designed for international investors to grow or preserve capital in a tax-efficient structure. It offers three plan options tailored to personal goals, with open architecture access to top global funds, no establishment charges, and no fees for currency exchange or asset transfers. Investors Trust’s open architecture platform provides you with significant investment freedom by spreading and varying your investments across a wide spectrum of asset classes and regional markets, giving you the power to purchase an almost unlimited array of investments, including Stocks, Bonds, ETFs, Mutual Funds, and Structured notes. Available in USD, EUR, or GBP, it supports partial withdrawals and borrowing against the plan for added liquidity. Products are issued from Puerto Rico, the Cayman Islands, and Labuan with strict regulatory oversight. Access Portfolio combines clarity, flexibility, and control to support global wealth planning.

[Best-International-Portfolio-Bond.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F05%2FBest-International-Portfolio-Bond.docx&form-id=45&field-id=18&hash=c53db4845265b95584522c8f13eb730f90d01e2a330a59f7155dd4b79faf263b)

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[Best-International-Portfolio-Bond-RL360.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FBest-International-Portfolio-Bond-RL360.docx&form-id=45&field-id=18&hash=cf7bd4c3f02c5a0e804bf0c7ffe4f887e43617b4e0d7a8bda05fd7c6a3d91819)

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Annette Devereux

Marketing Manager

Canada Life

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The Premiere Account is an innovative, flexible, market-leading life assurance investment bond offering the widest range of investment options possible for this product type, along with a high level of policy segmentation. Investors can have a choice of jurisdiction between the Isle of Man, and the Premiere Europe Account, which enables investors to benefit from the VAT advantages a product from an Irish-based provider offers. It offers flexibility, where accounts can be written as a series of 99,999 individual policies without any minimum investment amount.

Our Segregated Portfolio Service option (available through Ireland and the Isle of Man) gives advisers access to third-party investment managers, who in turn can invest outside of normal permissible assets, including direct investments in equities, bonds, gilts and more. This gives clients an almost unconstrained portfolio similar to directly held accounts, within a tax-efficient, flexible international bond wrapper.

[IA-Awards\_Best-International-Portfolio-Bond\_CLI.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FIA-Awards_Best-International-Portfolio-Bond_CLI.pdf&form-id=45&field-id=18&hash=2808457af6560bdb94cc9f4eae68618c85f0974da3086ac51eeea3276a734c46)

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Julie Barlow

Marketing Manager – Operations

Hansard

julie.barlow@hansard.com

Entry attached as a separate document due to limited character spacing. (Supporting document sent via email)

[IA-Awards-Submission-2025-Global-Select.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FIA-Awards-Submission-2025-Global-Select.pdf&form-id=45&field-id=18&hash=ecd7f6f221c5639f7ea0d599bd49b7719ba55f0f816ba53c270a80b614b89612)

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**Best International Savings Plan**

Lindsay Paris

Media & Communications Manager

Investors Trust

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Investors Trust offers two international savings plans designed for today’s mobile investor. The S&P 500 Index product allows for flexible contributions and 100 percent participation in index growth, with principal protection and term options of 10, 15, or 20 years, offering long-term growth with downside security. Evolution Plus, by contrast, offers a fully flexible, highly liquid solution with no fixed term, no bid offer spread, and direct access to global funds. Both are available in USD, EUR, and GBP, support multilingual service, and include a clear risk profiling process to guide investment decisions. Clients receive detailed product documentation in eight languages to ensure full transparency. With issuance from three jurisdictions and strong regulatory oversight, both products combine flexibility, compliance, and innovative design, positioning Investors Trust at the forefront of the cross-border savings sector.

[Best-International-Savings-Plan.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F05%2FBest-International-Savings-Plan.docx&form-id=47&field-id=18&hash=c73e682bd6c63079912ccac5dec56c3a85aac5385ff58741be03e73fd3e3beb3)

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Angela Gregory

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[Best-International-Savings-Plan-RL360.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FBest-International-Savings-Plan-RL360.docx&form-id=47&field-id=18&hash=ccf364b91225329bfa7f597a5deac4eba93a5c6fb57fd771849d8757e0d2cb8c)

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Angela Gregory

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[Best-International-Protection-Plan-FPIL.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FBest-International-Protection-Plan-FPIL.docx&form-id=47&field-id=18&hash=78c99787acd0a5e2de06c194d6979d327bfa72397db8df23afdf9324b19eef7d)

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Adele Cox

Head of Marketing

Zurich Integrated Benefits

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Please see the attached word doc - I'm having trouble uploading the words to this section. the guidelines state that the entry could have up to 900 words and but I'm limited to 1,000 characters here, so please see the attached - any problems please send me an email - many thanks !

[The-Zurich-International-Group-Risk-Solutions-final.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FThe-Zurich-International-Group-Risk-Solutions-final.docx&form-id=47&field-id=18&hash=81da2bf3dc257d7fccde92fa03d2d5bc707daeb7d0405160f91c4e94623f600f)

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Julie Barlow

Marketing Manager – Operations

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Entry attached as a separate document due to limited character spacing. (Supporting document sent via email)

[IA-Awards-Submission-2025-Ascend.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FIA-Awards-Submission-2025-Ascend.pdf&form-id=47&field-id=18&hash=9eb0898dbc770ccddc3a6cfc0a9d45e0353d6c65de5b17b3c3f4c5895cb1c934)

**Excellence in Client Service (by region and overall global winner)**

Asia

Lindsay Paris

Media & Communications Manager

Investors Trust

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Investors Trust began serving Asia in 2003, expanding its presence with offices in Malaysia and a new service hub in Kuala Lumpur in 2023. This regional focus enables timely, personalized support aligned with client needs. The Resolution Center, a 24-hour multilingual online chat, allows advisers to access real-time assistance, supported by email and phone channels. ITA Connect, the company’s mobile app, includes product tools, calculators, and Morningstar access, with enhancements added in the past year to improve speed, usability, and reporting. Illustration Software was updated to support deeper client understanding. Through ITA University, launched in 2023 with partners IE University and CFA Institute, advisers access online courses and were invited to an in-person Masterclass in Madrid in 2024. Combined with a redesigned website and expanding educational tools, Investors Trust continues to lead in service innovation across Asia.

[Excellence-in-Client-Service-ASIA.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F05%2FExcellence-in-Client-Service-ASIA.docx&form-id=53&field-id=18&hash=d35878f06d6595e062aef8627147f9623cfb377b3362180b7a36a3826266d078)

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Middle East

Lindsay Paris

Media & Communications Manager

Investors Trust

Lparis@investors-trust.com

Investors Trust expanded into EMEA in 2014 with a DFSA license and the opening of its Dubai office. In 2023, it launched ITA India to strengthen support across time zones with local expertise. The Resolution Center, a 24-hour multilingual chat, allows advisers to communicate with trained specialists in real time, alongside email and phone service. The ITA Connect app has been enhanced with new calculators, improved account access, and Morningstar reporting. The Illustration Software was updated to support rider and withdrawal modeling, bonus projections, and death benefit visibility. Investors Trust also invests in adviser education through ITA University, launched with IE University and the CFA Institute. A Masterclass in Madrid in October 2024 brought top students together for in-person learning. With a redesigned website, new content tools, and regional expansion, Investors Trust continues to lead client service across EMEA.

[Excellence-in-Client-Service-EMEA.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F05%2FExcellence-in-Client-Service-EMEA.docx&form-id=53&field-id=18&hash=45a9d7b625139c93d3ca0a3f7910012c41fae5b61387157751815bdda5701cf3)

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Lat Am

Lindsay Paris

Media & Communications Manager

Investors Trust

lparis@investors-trust.com

Founded with a focus on Latin America, Investors Trust has strengthened its presence through regional offices in Montevideo and expanded support teams. The Resolution Center provides 24-hour multilingual support via online chat, email, and phone. Advisers also benefit from ITA Connect, a mobile app offering product tools, calculators, risk profiling, and Morningstar access. Recent upgrades enhanced speed, usability, and reporting. Illustration Software improvements now allow advisers to model riders, withdrawals, and bonus projections. Educational development is a priority, with ITA University launched in partnership with IE University and the CFA Institute. In October 2024, top students joined an exclusive Masterclass in Madrid. Investors Trust also enhanced its website with dedicated adviser and client sections, a new Content Library, and an updated Newsroom, reinforcing its commitment to service excellence across the region.

[Excellence-in-Client-Service-LATAM.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F05%2FExcellence-in-Client-Service-LATAM.docx&form-id=53&field-id=18&hash=1bb9ae1acc3e3ffef59d29e033d7dd69bb4942e1180f09a1e557eff8b69c7d30)

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Rest of World

Lindsay Paris

Media & Communications Manager

Investors Trust

lparis@investors-trust.com

Investors Trust delivers global client service through local presence in Latin America, Asia, and EMEA, with offices in Miami, Puerto Rico, the Cayman Islands, Montevideo, Malaysia, Dubai, and India. The Resolution Center offers 24-hour multilingual support via online chat, email, and phone. Advisers also benefit from ITA Connect, the company’s mobile app, enhanced with new calculators, tools, and Morningstar integration. Illustration Software updates include rider modeling and bonus projections to support adviser presentations. Clients access multilingual documentation and a digital platform to manage investments. ITA University, launched with IE University and CFA Institute, offers online training. In October 2024, top students attended a Masterclass in Madrid. The updated corporate website and ongoing industry engagement through AILO and AM Best reinforce Investors Trust’s commitment to service, education, and innovation worldwide.

[Excellence-in-Client-Service-Overall.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F05%2FExcellence-in-Client-Service-Overall.docx&form-id=53&field-id=18&hash=de3dc11f931a4dbffdc05397d6c71c4befafb39d608bd400aae7f55a251ae62b)

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Asia

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[Excellence-in-Client-Service-RL3602.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FExcellence-in-Client-Service-RL3602.docx&form-id=53&field-id=18&hash=4133838bdae401915559bfa34fbc12beb1b8ef3e5ad5f08dc549f7e14690b4f4)

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Lat Am

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[Excellence-in-Client-Service-RL3601.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FExcellence-in-Client-Service-RL3601.docx&form-id=53&field-id=18&hash=cd49df62a9e7e0f91b3006250ebf7f6b577ce4a0ad49fb5fde702de16b7a50c3)

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Middle East

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[Excellence-in-Client-Service-RL360.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FExcellence-in-Client-Service-RL360.docx&form-id=53&field-id=18&hash=2f3c6a1521e5c9d5de14fa209733e7ec8571aeef7098bedbee60e247c9eda32d)

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Choose Region

Julie Barlow

Marketing Manager – Operations

Hansard

julie.barlow@hansard.com

Entry attached as a separate document due to limited character spacing

[IA-Awards-Submission-2025-Client-Service.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FIA-Awards-Submission-2025-Client-Service.pdf&form-id=53&field-id=18&hash=6c4f0497c15069da0d12d3403f3c8431067ea005fc38a82b1eaffb385d83d1e7)

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**International Accountancy Firm of the Year**

Alicia Claire Ireland FMAAT

Owner

Cornflower Accountants

info@cornfloweraccountants.co.uk

Founded during the Covid-19 pandemic in 2020, Cornflower Accountants has grown from a side project into a thriving international firm built organically on expertise, transparency and client-focused service. Specialising in residency, domicile and foreign tax credits, I support globally mobile clients and work closely with Financial Advisors in both the UK and US. Over the past year, client referrals have driven 40% growth, including a fivefold increase through one US advisor. My Big 4 background enables me to offer the insight of a global firm with the personal touch of a boutique practice. I’m passionate about helping expats navigate complex UK tax matters, from property sales to tax advice. Every client receives clear, upfront pricing and tailored, expert advice. I take pride in offering a level of personalised, cross-border advice that is truly uncommon in the UK accountancy landscape.
Please read attached documents for a complete overview plus client/ partner testimonials.

[Award-Submission.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FAward-Submission.docx&form-id=55&field-id=18&hash=7df96d0f1ed8f6c02bb959c13c0cfd47d0ae939c225cbfba09daf9d91ed7d3f6)

**International Discretionary Fund Manager of the Year**

Siobhan Mitten

Senior Communications Manager

LGT Wealth Management

siobhan.mitten@lgt.com

LGT Wealth Management (LGT) is a UK-based wealth management firm and is part of the world’s largest private bank and asset manager owned by a single family, the Princely House of Liechtenstein, who have overseen the Group for over 80 years.
Our entrepreneurial approach, together with the wider LGT Group’s longevity, and thus stability, enables us to make decisions that we believe will provide long-term benefits for our clients. This security and flexibility allow us to tailor our business model to suit our vast range of client types and their individual, unique requirements, be it private clients, institutional clients, financial intermediaries or international clients. As at end of June 2024, our total assets under management is £30.4 billion.

We have access to six international booking centres with offices in the world’s key financial markets. Group-wide, we employ over 4,150 staff in over 25 locations across Europe, Asia, the Americas, Australia and the Middle East.

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Madhu Kalia

Associate Director - Press & IW

Rathbones Group PLC

madhu.kalia@rathbones.com

[IA-GFS-Awards-2025-Rathbones-International-Discretionary-Fund-Manager-of-the-Year-entry.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F05%2FIA-GFS-Awards-2025-Rathbones-International-Discretionary-Fund-Manager-of-the-Year-entry.docx&form-id=59&field-id=18&hash=f86a6d2bd5f004c3c26dddd6859c7729f789c3892feac76de4ccf0b90f4af193)

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Harriette Collings

Director, Business Development

Evelyn Partners

harriette.collings@evelyn.com

See attached file

[Best-DFM-IA-Awards-2025-Evelyn-Partners.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FBest-DFM-IA-Awards-2025-Evelyn-Partners.pdf&form-id=59&field-id=18&hash=89ae0349e0f34d05fa47aba5386f88cce1e1fc5fac5a93653403351cf9b2b654)

**International Financial Centre of the Year**

Adam Riddell

Director

Jersey Finance

adam@crystalpr.co.uk

Submitting file (attached) on behalf of Jersey Finance

[International-Adviser-Global-Financial-Services-Awards-2025-JFL-submission-final.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FInternational-Adviser-Global-Financial-Services-Awards-2025-JFL-submission-final.docx&form-id=61&field-id=18&hash=48646e209181848d6f702e56c56a7306d310225f7dbc83e02465d97f37b9d5c3)

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Dina Hill

Marketing Manager

Finance Isle of Man

dina.hill@gov.im

please see the attached file

[IA-awards-submission-final.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FIA-awards-submission-final.docx&form-id=61&field-id=18&hash=27422f146eb2f57770b26366eef06897d1288ca3bb041527b904d623563fe9bf)

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Erin Mansell

Senior Communications Executive

Guernsey Finance

erin@guernseyfinance.com

Why should Guernsey win this award?
• NPPR Advantage – Guernsey’s National Private Placement Regime (NPPR) allows efficient access to key European capital markets covering more than 70% of EU GDP.
• Ideal for small to mid-size managers raising European capital for the first time—particularly in PE, VC, credit, infrastructure, and real estate.
• Attractive for larger managers who have faced challenges with other jurisdictions.
• Faster time to market – funds can launch in as little as 24 hours under certain conditions.
• Cost-effective – Independent Corvus research indicates that Guernsey-domiciled funds cost up to €3 million less over their lifecycle than equivalent EU structures.
• Leading in VC – In 2022-23, twice as many VC funds raised were in Guernsey compared to the next most popular jurisdiction in Europe.
• Market credibility - Guernsey remains the #1 jurisdiction for non-UK companies listing in London (LSE & AIM) ), also supporting listings on Euronext, NYSE, TISE.

[Guernsey-IFC-of-the-Year-International-Adviser-Global-Financial-Services-Awards-2025.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FGuernsey-IFC-of-the-Year-International-Adviser-Global-Financial-Services-Awards-2025.docx&form-id=61&field-id=18&hash=78f29297b19b61b796adf7134e90ac05ff01c333c7bcfb7ffb55687f601b9fb0)

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Marcus Bailey

Lead Consultant and Advisor

Dubai International Financial Centre

c-marcus.bailey@difc.ae

DIFC attracted 1,823 new registrations in 2024, workforce grew to 46,078 professionals, of which 4,243 are within AI, FinTech and Innovation sectors. 2024 revenues reached USD 484mn and operating profit grew to USD 363mn.

Among 6,920 active companies are 260 banking and capital markets companies, 410 wealth and asset management firms, 75 hedge funds, and 125 (re)insurance companies. This includes 70 brokerage companies and 27 G-SIBs. The FinTech and innovation sector expanded to 1,245 companies in 2024, including 180 AI firms.

800+ family-related businesses operate within DIFC. Around 120 families and wealthy individuals manage more than USD 1.2trn of wealth. Foundation structures surged to 671 while the Dubai AI Campus attracted over 180 companies.

Operating at 99.8 per cent occupancy, an additional 1.6mn sq. ft. of commercial space will be launched soon. Fostering excellence, 41,456 people graduated from DIFC Academy programmes to date, with 9,156 benefiting in 2024.

[Annual-Review-2024-presentation-EN-PDF-APPROVED-10-Feb-2025.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FAnnual-Review-2024-presentation-EN-PDF-APPROVED-10-Feb-2025.pdf&form-id=61&field-id=18&hash=706ed0074a754d40235697f631cde5e805a82176d4f0bb5638a90e17542cf64c)

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**International Fund Management Group of the Year - Large/Small/Boutique**

Andrew Webb

Communications Director and Vice President

Dimensional Fund Advisers

Andrew.Webb@dimensional.com

See file

[DFA-Submission\_International-Adviser-Global-Financial-Services-Awards-2025.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F05%2FDFA-Submission_International-Adviser-Global-Financial-Services-Awards-2025.docx&form-id=63&field-id=18&hash=342c876a43ee8f1078ef355977dfcbba1ae39613271eddc86168604aa90d04f3)

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Malcolm Jones

Investment Content and PR Manager

Marlborough

malcolm.jones@marlboroughgroup.com

[230425-Award-submission.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2F230425-Award-submission.docx&form-id=63&field-id=18&hash=e897ef4926710323b4ffcd0dbb5a35ee99c63aff21ac0485031923f52e8d70bc)

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Freddie Streeter

Head of Multi-Asset Solutions

Pacific Asset Management

fstreeter@pacificam.co.uk

Pacific Asset Management - IA Global Financial Services Awards Submission.

Please see our entry in the PDF below.

[IA-Global-Financial-Services-Awards-Pacific-Asset-Management.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FIA-Global-Financial-Services-Awards-Pacific-Asset-Management.pdf&form-id=63&field-id=18&hash=f89b82217e960b370130e0e303aedf85269e9c54af14ba0c3b4e6d532116aefe)

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Allan Stewart

Managing Director (Jersey)

Oakglen Wealth

allan.stewart@oakglengroup.com

Attached is our entry for this category nomination. Our excellent five-year performance data can be obtained and corroborated by Morningstar Direct. We appreciate the nomination and thank you in advance for the consideration of our business in this category.

[OWL-International-Fund-Management-Group-of-the-Year.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FOWL-International-Fund-Management-Group-of-the-Year.docx&form-id=63&field-id=18&hash=a6ccce962d1ce2db8f7e7d0a6630f862585bbc235ab626e6aaa77f1e5e4e6dde)

**International Law Firm of the Year**

Chloe Whittaker

Senior External Communications Executive

Mourant

chloe.whittaker@mourant.com

Mourant is a law firm-led, professional services business with over 60 years' experience in the financial services sector. We advise on the laws of the British Virgin Islands, Cayman Islands, Guernsey, Jersey, and Luxembourg, and provide specialist entity management, governance, regulatory and consulting services.

Whilst Mourant has an established reputation in areas including finance, funds and corporate, this submission focuses on our private wealth practice. At the core of our success is our deep experience in handling complex, multi-jurisdictional matters.

The firm has demonstrated innovation in international private client legal services in a year defined by complexity and change across global markets. We have not only continued to provide technically robust, cross-border legal advice but helped shape the broader conversation around regulation, private wealth structuring, and the future of international finance.

[Global-Financial-Services-Awards-2025-Mourant-submission-FINAL.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FGlobal-Financial-Services-Awards-2025-Mourant-submission-FINAL.pdf&form-id=65&field-id=18&hash=86fb28da6c0769196bb43609121f53a0715938975beaa7e3ca70f94913e4910c)

**International Life Group of the Year (Non-UK)**

Angela Gregory

Communications Executive

IFGL

angela.gregory@ifg-ltd.com

[International-Life-Group-of-the-Year-Non-UK-IFGL.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FInternational-Life-Group-of-the-Year-Non-UK-IFGL.docx&form-id=67&field-id=18&hash=4836d6094033e5532dae11120928e637681ee61a3fdc09a7baf80282f0c84017)

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David Findlay

Marketing and Communications Manager

Utmost Group

david.findlay@utmostgroup.com

Entry attached as Word file (ref email from Mark)

[International-Adviser-Awards-2025-Life-Group-non-UK-Final.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FInternational-Adviser-Awards-2025-Life-Group-non-UK-Final.docx&form-id=67&field-id=18&hash=7daa62e4e8afdd09a546b253c73823d432646e0e5316e41628e752761cc93757)

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**International Life Group of the Year (UK)**

Annette Devereux

Marketing Manager

Canada Life

annette.devereux@canadalife.co.uk

As the UK’s leading provider of international planning and tax efficient solutions, we've continued to innovate, enhance our relationship with advisers and improve customer experiences. We offer a range of international bonds that enable growth with flexibility through a choice of provider jurisdictions and the widest access to platforms and DFMs. The Canada Life International Financial Strength rating was upgraded to A (Superior) by AKG and we've held a 5-star AKG rating for the past 21 years.
We supported advisers with expert insights in tax planning. Following the Budget in October, we provided information on the impact of the changes, explored what the planning options are for dealing with non-domiciled clients with case studies, and explored options available to serve specific financial planning requirements. We’ve also developed innovative adviser CPD by expanding our technical webinar programme, launched our Life 100+ campaign and delivered 18 adviser events in our roadshows.

[IA-Awards\_International-Life-Group-of-the-Year-UK\_CLI.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FIA-Awards_International-Life-Group-of-the-Year-UK_CLI.pdf&form-id=69&field-id=18&hash=0da0b724f02a7daec443e16173994647a76c9d59686db2ed53c66e7184dde6a6)

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David Findlay

Marketing and Communications Manager

Utmost Group

david.findlay@utmostgroup.com

Entry attached in Word format (ref email from Mark)

[International-Adviser-Awards-2025-Life-Group-UK-Final.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FInternational-Adviser-Awards-2025-Life-Group-UK-Final.docx&form-id=69&field-id=18&hash=b4cb6f60ab4c008c6ae2c18e664e30f748c145c6bfa7c7dab1e18bcaedaf7ab3)

**International Platform of the Year**

Harvinder Virdi

Senior Product Marketing Manager

Morningstar Wealth

harvinder.virdi@morningstar.com

Entry for the International Adviser Global Financial Services Awards 2025
Category: International Platform of the Year
Completed by Helena Hill, Marketing Director, Morningstar Wealth

[MW-International-Adviser-Int-POTY-final-supporting-evidence.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F05%2FMW-International-Adviser-Int-POTY-final-supporting-evidence.pdf&form-id=71&field-id=18&hash=5079df4b038aa8cea6bafc6e98d2adade50b6ea4ca71ca79f81409edb0ce6396)

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Steve Newell

Head of Marketing

Novia Global

steve.newell@novia-global.com

[International-Platform-of-the-Year-Submission.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FInternational-Platform-of-the-Year-Submission.pdf&form-id=71&field-id=18&hash=6a9f9e25993414e61f50d5cb823a78a94a981988de3abbc51d80e692d8a666c3)

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Angela Gregory

Communications Executive

Ardan International

angela.gregory@ifg-ltd.com

[Best-Platform-Ardan.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FBest-Platform-Ardan.docx&form-id=71&field-id=18&hash=8c453d7706ff43d59c5eb7f7b6444a6b510efe63014330e47c4a7dfd26bff76d)

**International Private Health Insurer of the Year**

Niki Barnes

International Marketing Manager

William Russell

niki.barnes@william-russell.com

I have not been able to copy our submission in as the character count appears to be broken so instead, I've attached as a PDF, hope ok! Thanks NIki

[William-Russell-Global-Financial-Services-Awards-2025.pdf](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FWilliam-Russell-Global-Financial-Services-Awards-2025.pdf&form-id=73&field-id=18&hash=f8d912b2710889ecb3f9ea8abec6d7002462a54dfacef5c35b88b6293f0fb2e9)

**International Trust and Estate Planning Firm of the Year**

Angela Gregory

Communications Executive

IFGL Global Trusts

angela.gregory@ifg-ltd.com

[International-Trust-and-Estate-Planning-Firm-of-the-Year-IFGL-Global-Trusts.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FInternational-Trust-and-Estate-Planning-Firm-of-the-Year-IFGL-Global-Trusts.docx&form-id=75&field-id=18&hash=80ee46705451102fa0606e5eca34bb80a06d0d0c36aa1c21e823bc87db35026d)

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Annette Devereux

Marketing Manager

Canada Life

annette.devereux@canadalife.co.uk

Our key initiatives & achievements in 2024:
• Winner of Best International Trust Product for the market-leading Wealth Preservation Account at the Investment International Awards 2024
• Canada Life International Financial Strength rating upgraded to A (Superior) by AKG. We have held a 5-star AKG rating for the past 21 years
• Supported advisers with expert insights in tax planning. Following the Budget in October, we provided information on the impact of the changes, explored what the planning options are for dealing with non-domiciled clients with case studies, and explored options available to serve specific financial planning requirements
• Our 2 Roadshows in 2024 included 18 face-to-face adviser events across the UK, with expert insights from our iCan technical team
• We launched our Life100+ campaign, using comprehensive research on helping customers and advisers financially plan for a longer later life, and the power of intergenerational conversations

[IA-Awards\_International-Trust-and-Estate-Planning-Firm-of-the-Year\_CLI.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FIA-Awards_International-Trust-and-Estate-Planning-Firm-of-the-Year_CLI.docx&form-id=75&field-id=18&hash=d693b795b384f6e2f852f07c05afde25ecde01360f438e880bdfc232065b4192)

**The International Adviser Award for Outstanding Business Contribution**

Angela Gregory

Communications Executive

RL360

angela.gregory@ifg-ltd.com

[IA-Award-for-Outstanding-Business-Contribution-RL360.docx](https://internationaladviser-awards.com/index.php?gf-download=2025%2F04%2FIA-Award-for-Outstanding-Business-Contribution-RL360.docx&form-id=79&field-id=18&hash=3402ad6a551990f0a70cb7e1be4b6fb4a9966348199ec12fc46d1dd7625ab8be)