

Building A True Partnership With Citco



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Winner

• **Outstanding Contribution to Wealth Management Thought Leadership (Individual) - Latin America**

What was the winning formula of your firm/you that explains why you won?

Citco is a family-built, people-driven business, with 75 years of experience in supporting high-net-worth individuals and families with the preservation and growth of their assets for future generations. As a business we understand our clients' unique needs and make it a priority to really listen to their challenges, whilst helping them to navigate the changing global environment in which they operate. We have always striven to build long-term partnerships with both our clients and their advisors, and this has contributed to our success today.

Personally, I have found my work with the Latin American community, in particular, very rewarding. Over the years I have built up a strong network across key countries and professional groups within the region. This all started with a simple goal of creating and growing an international community for collaboration and learning, drawing from different jurisdictions and industry experts. In order to serve clients at a high level, there is a continuous need to educate ourselves, learn from each other and give back as a community.

Please describe how your colleagues made a difference?

I have been working at Citco for more than 25 years, and I am pleased to say that we work among not only colleagues but also friends, and that makes a difference. I am proud to be a part of large team of experienced professionals with expertise across multiple disciplines, who share the same passion for client service and excellence. Together, we are focused on delivering the best possible service to our clients to ensure they can achieve their estate planning, wealth preservation and investment strategies.

What are you going to do to remain competitive and stay ahead?

Cultivating our relationship with families and their advisors remains a key priority. In addition to this, we have to keep up-to-date with the revolving door of trends and changes affecting our clients. They expect us to keep them informed and educated so they can in turn make important decisions. Lastly, we continue to invest in technology and new tools which will allow us to service clients more efficiently.

Where do you see the wealth management industry and your part of it going in the next five years?

Personalization has been a constant cornerstone of the wealth management industry and continues to stand the test of time. Despite the innovations and efficiencies brought in by the ever-evolving technological wave, at Citco we believe there is still great value in maintaining a personalized approach and delivering a completely tailored package of services for each of our private wealth clients.

This challenge of striking the right balance will continue to be tested as we enter 'The Great Wealth Transfer' stretching ahead of us in the next two decades. Widely described as the largest wealth transfer in history, there will be an important role to play in supporting our clients through this significant period of change which is centered on the transfer of assets to the next generation. Clients will look to us to help manage the differing expectations and goals often found within multi-generational families. A number of factors will come to the fore, from navigating family dynamics and next generation engagement, through to estate planning and tax considerations.