

Kleinwort Hambros launches digital investment tool and appoints new Chief Digital Officer

- **EVA is a new interactive tool for advisers to explore investment solutions**
 - **Gene Salerno appointed Chief Digital Officer in newly-created role**
 - **Demonstrates commitment to the client experience through development of digital capabilities**
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Press release

London, 26 November 2019

Kleinwort Hambros has today announced the launch of EVA, an interactive tool for exploring investment solutions with prospects and clients.

EVA is a digital reinvention of traditional document-based proposals, replacing them with an interactive application containing the entire range of Kleinwort Hambros' standard discretionary investment solutions. Advisers can work with clients in real-time to find the right solution, in a highly personalised and accessible way.

Initial capabilities focus on investments, while future versions will integrate wealth planning and credit. The app is designed for iPads, Android tablets and touch-enabled PCs, and can also operate on a standard non-touch computer.

In conjunction with the launch, Kleinwort Hambros has appointed Gene Salerno, programme lead on EVA, to the newly created role of Chief Digital Officer. Reporting to Deputy CEO and CIO, Mouhammed Choukeir, Gene will direct the development of the firm's digital capabilities to help enhance the client proposition and drive business growth.

Gene joined Kleinwort Hambros in 2011 as Head of Asset Allocation and Equities and became Head of Investment Strategy in 2015, chairing the Investment Committee and overseeing recommendations for Kleinwort Hambros' investment management clients. He is the former manager of the multi-award-winning Global Equity strategy and managed multi-asset portfolios for clients directly.

Commenting on the launch, Gene Salerno said:

“EVA is a leading-edge capability that can positively differentiate us in the market. It further empowers our advisers with the most effective tools to interact with clients, leveraging modern information technologies and data with the human touch.

“‘Eva’ means ‘full of life’ traditionally, and our EVA brings greater life to discussions with clients. We are delighted by their feedback so far.”

On Gene’s appointment, Mouhammed Choukeir, Deputy CEO and Chief Investment Officer, said:

“We established this role in recognition of the need to enhance our digital proposition. This is also evidenced by the recent upgrade of our e-banking service to improve its functionality and security. As Chief Digital Officer, Gene will play a leading role in the firm’s efforts to build on our digital capabilities, which are critical to the growth strategy of the business.”

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Gene Salerno biography

Gene joined Kleinwort Hambros in 2011 as Head of Asset Allocation and Equities and became Head of Investment Strategy in 2015 – chairing the Investment Committee and overseeing recommendations for Kleinwort Hambros’ investment management clients. He is the former manager of the multi-award-winning Global Equity strategy and experienced in managing multi-asset portfolios for clients directly.

Previously, Gene was responsible for the investment function of Karrig Strategic Capital, a London-based family office, managing investment portfolios and supporting client activities across direct private equity and real estate.

With a background rooted in engineering and technology, Gene’s early career involved developing electronic equity trading networks with Thomson Financial, and developing aspects of the PATRIOT missile defense system with Raytheon Company.

Gene has a Master’s in Business Administration from London Business School and graduated summa cum laude with a BSc in Computer Science from Binghamton University, New York. He holds the Private Client Investment Management Certificate and is a member of the Chartered Institute for Securities & Investment.

Kleinwort Hambros

Kleinwort Hambros is the private banking and wealth management division of Societe Generale in the UK, Channel Islands and Gibraltar.

Combining two award-winning private banks, Kleinwort Hambros has over 200 years’ experience of helping individuals, families, entrepreneurs, trusts and charities to manage their wealth.

Kleinwort Hambros knows how to simplify life’s financial challenges and understands the importance of creating strong relationships with clients based on trust, service and expert knowledge. Providing a personal and holistic approach to wealth management from specialist teams and experienced private bankers, Kleinwort Hambros offers a wide range of services, including investment management, domestic and international wealth planning, lending, fiduciary and banking services.

Its multi-lingual teams include the French, Middle East, and Russian desks who provide solutions for both domestic and non-domestic clients.

With assets under management of £14.2bn and over 900 employees at end Dec 2018, Kleinwort Hambros has offices in London, Cambridge, Newbury, Leeds, Edinburgh, Guernsey, Jersey and Gibraltar.

For more information please visit www.kleinworthambros.com. If you wish to unsubscribe from these announcements, please contact sgkh@lansons.com

Societe Generale Private Banking

Societe Generale Private Banking, the wealth management arm of Societe Generale, is one of the leading private banks in Europe, with EUR 118 billion of assets under management at the end of December 2017.

With 2,500 staff in 11 countries across the globe, Societe Generale Private Banking offers wealth management solutions to entrepreneurs and High Net Worth Individuals.

The expertise of its private banking teams in wealth planning, investment advisory and financing solutions regularly receives awards. In 2016, 2017 and 2018, Societe Generale Private Banking was voted:

- Best Credit Provider (WealthBriefing Swiss Awards, 2018)
- Outstanding Private Bank - Western Europe (Private Banker International, 2017)
- Best Wealth Planning Team (WealthBriefing European Awards, 2017)
- Best Wealth Manager in France - Affiliate Bank (Leaders de la Finance, 2017)
- Best Private Bank for Entrepreneurs in Western Europe (Global Finance, 2017)
- Best Private Bank France (Global Finance, 2016)
- Best Private Bank Monaco (Global Finance, 2016)
- Outstanding Private Bank for Relationship Service and Engagement (Private Banker International, 2016)
- Past performance should not be seen as an indication of future performance.

For more information, you can follow us on twitter  @SG_PrivateBank or visit our website privatebanking.societegenerale.com

Societe Generale

Societe Generale is one of the leading financial services groups in Europe. Drawing on a diversified and integrated model, the Group combines financial solidity, dynamic innovation and a strategy of sustainable growth to be a trustworthy partner for its clients that is committed to the positive transformation of societies and economies.

Societe Generale has been playing a vital role in the economy for more than 150 years, boasts a solid position in Europe and is connected to the rest of the world. With more than 147,000 employees based in 67 countries, we serve 31 million individual, corporate and institutional customers around the world on a daily basis by offering a wide range of advisory services and tailored financial solutions in three complementary core businesses:

- Retail banking in France with the Societe Generale branch network, Crédit du Nord and Boursorama, offering a comprehensive range of multi-channel financial services that are on the leading edge of digital innovation;
- International retail banking, insurance and corporate financial services, with a presence in Africa, Russia, central and eastern Europe, and leading specialised businesses.
- Global Banking and Investor Solutions, which offers recognised expertise, key international locations and integrated solutions.

Societe Generale is included in the main socially responsible development indices: DJSI (World and Europe), FTSE4Good (Global and Europe), Euronext Vigeo (World, Europe and Eurozone), four of the STOXX ESG Leaders indices, and the MSCI Low Carbon Leaders Index.

For more information, follow Societe Generale on Twitter  @societegenerale or go to www.societegenerale.com