Global reach
Pinpoint delivery

SIONIC®

Global financial services specialists

Wealth management & private banking

SIONIC®

Sionic is a global consulting firm. Our focus is on change and we specialise in a unique blend of business and people performance.

We are agile, independent and hold a straightforward philosophy – that outstanding people produce outstanding work.

Our values

Our approach is rooted in our DNA. Our values determine our behaviour and how we work with our clients, partners and colleagues.

Global Collaboration | Pace & Ambition | Expertise with Integrity

“We have a not-so-secret weapon: our people. Combined, they possess an incredible depth of knowledge and a unique ability to deliver that knowledge where clients need it most.

We call it specialism at scale.”

Craig Sher Chief executive officer

Our sectors

Asset management

Financial markets infrastructure

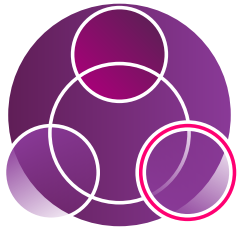
Private equity, real estate & trust administrators

Corporate & investment banking

Insurance & reinsurance

Wealth management

Our practices



Asset management

We provide specialist advisory and implementation consultancy services covering strategy, business, operations and technology change.

Client lifecycle management

We are experts in the analysis, design and implementation of KYC including client onboarding, life-cycle management and off-boarding.

Data & technology

We specialise in data strategy, governance and management; technology architecture and organisation design, cyber and digital.

Finance & fund administration

We work with finance and asset servicing organisations to simplify and enhance process and data for analysis and reporting.

Financial crime & compliance

We help clients to manage their risks and responsibilities with regard to anti money laundering, terrorism, bribery, corruption and fraud.

Front office business lines

We support all aspects of front-office activity, enhancing client relationships, client services, client protection and the overall client experience.

Group risk & capital

We are expert practitioners in market, credit, counterparty, liquidity and funding risks, as well as leverage ratio and balance sheet management.

Learning & development

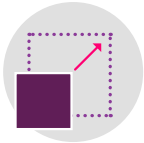
We accelerate improvements in results by building new capabilities and creating cultures of high performance.

Operations

We specialise in operations strategy, operating models, business platforms, risk management and governance.

Regulation

We help clients to enhance, remediate and rationalise compliance and control, through technology, people and process improvements.



Transformation

We draw on our specialist knowledge and extensive industry experience to deliver meaningful and lasting organisational change.

Wealth management & private banking

We advise on proposition development, end-to-end business improvement, technology, risk and corporate governance.

Wealth management & private banking

Overview

Wealth managers, private banks and platforms worldwide are all experiencing significant change. Commercial and regulatory pressure is driving efficiency, capability and improved controls. In this highly regulated industry, we advise clients on proposition development; client service and business improvement; the use of technology; risk controls and corporate governance. Our people have all worked in the industry and our specialism is born of real experience. We provide professional programme management and change delivery services using knowledgeable teams to give fast, effective results. We also provide unique expertise in organisation design and people development, proven to increase business effectiveness, enhance change outcomes and embed sustainable improvement.

Wealth management & private banking

Specialisms

Client service improvement

Corporate governance & board effectiveness reviews

Digital client journey

KYC & financial crime

Mergers & acquisitions

Outsourced supplier selection, negotiation & benchmarking

Programme management & change delivery

Proposition development

Regulatory change

Target operating model design

Technology solution selection

Meet the experts

Gilly Green
Managing Partner

I've worked in the finance industry for over 30 years, focusing mainly on wealth management. During that time, I've gained a breadth of knowledge and experience across all aspects of the business, including strategy execution, client proposition, operating model design and outsourcing negotiations. Having worked within the industry, including managing a client service team, I advise with empathy, knowing what change feels like in practice and how to get the buy-in needed for success. Pragmatism is key to my approach, balancing the need for controls and compliance against the needs of both firm and clients for flexibility and efficiency.

WEALTH MANAGEMENT & PRIVATE BANKING

e gilly.green@sionic.com

Hear Gilly Green in conversation with CityWire Wealth Manager about SMCR >

Meet the experts

Paddy Lewis
Partner

I joined Sionic after 27 years in the wealth management and private banking industry at UBS, Laing & Cruickshank, Merrill Lynch and Wise Speke. I have a strong track record in both product design and delivery as well as client facing roles. As a result I am well placed to advise firms on a broad range of topics affecting both larger private banks and smaller wealth management organisations.

At UBS I held several senior leadership positions, latterly as UK Head of Investment Products & Services and was a member of the UK management team. In addition to my current role at Sionic, I am a Trustee of the Ocean Youth Trust and a member of the business leaders council for TeachFirst. I am Chartered Member of the CISI (Chartered Institute for Securities and Investments).

WEALTH MANAGEMENT & PRIVATE BANKING

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Meet Paddy Lewis, Sionic Partner and wealth management and private banking specialist

Meet the experts

Philip Biber

Partner

I joined Sionic in July 2019 as a Partner in the Wealth Management & Private Banking Practice, based out of Geneva. I was a Founding Partner and Chief Operating Officer at MBaer Merchant Bank. My previous roles also include COO for HSBC Global Private Banking EMEA and Global Head of Private Wealth Management Operations for Deutsche Bank, New York.

WEALTH MANAGEMENT & PRIVATE BANKING

e philip.biber@sionic.com

Meet Philip Biber, Sionic Partner and Wealth Management specialist

Meet the experts

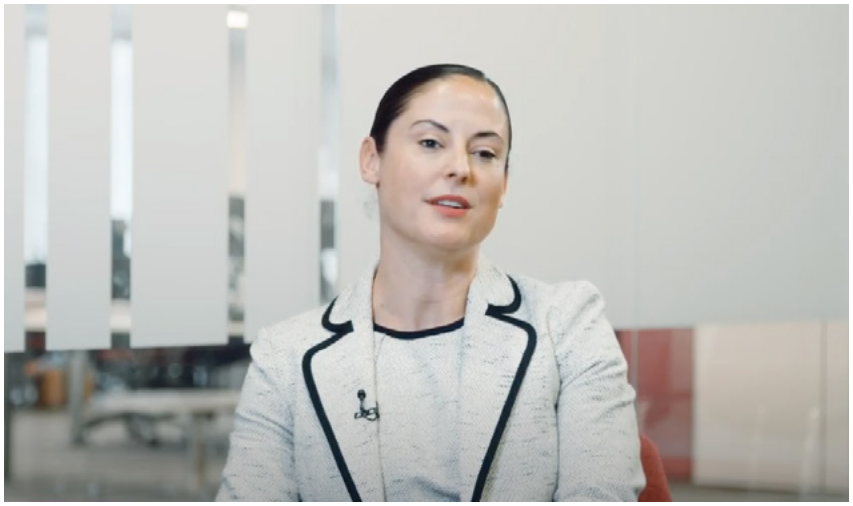
Shelley Doorey-Williams
Partner

I am a Chartered governance professional with 28 years' multi-industry experience working in business management and corporate governance. The majority of my career has been within the financial services industry where I have been involved in leading teams of client relationship managers, formulating and implementing product strategies, managing regulatory change initiatives and leading an international Wealth Planning business. I am on the Board of Governors of The London Institute of Banking and Finance, and a committed advocate and author on the topic of gender diversity.

WEALTH MANAGEMENT & PRIVATE BANKING

e shelley.doorey-williams@sionic.com

Meet Shelley Doorey-Williams, Sionic Partner and governance and gender diversity expert



Our global presence

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