

Euromoney Private Banking and Wealth Management Survey 2021: Methodology

The annual Private Banking and Wealth Management Survey provides a qualitative review of the best services in private banking, by region and by areas of service. The survey is completed by private banks and wealth managers to identify the firms that they consider to be their top competitors.

Participating private banks and wealth managers are able to access the questionnaire directly from the homepage at www.euromoney.com.



We are interested in the views of senior private banking/wealth management staff with a perspective on the relative merits and demerits of their bank and its competitors. We ask the voters to identify the country about which they have the most knowledge. They then nominate their top three peers in that country in each category. We will award four, three and two points, respectively to each of those nominations in that category and country. We will also award participation points to the respondent's own firm to offset the nominations they provide for their competitors. We ask every respondent to provide their individual opinions rather than those of their company.

The optimal number of responses per firm is three employees in each country of operation.

No self-nominations or parent/subsidiary company nominations are allowed.

The survey results will be based on peer nominations and voter participation points only. There is also a market outlook section at the end of the survey which is of editorial interest only and is not being scored for the rankings.

The global and regional results are weighted aggregates of the country results.

We received 2332 valid responses for the 2020 Survey.

For more information about the survey please email surveys and indices manager, Chen-Ta Sung (chenta.sung@euromoney.com)