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THROUGH THE **WEALTHBRIEFINGASIA** AWARDS PROGRAMME

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WINNERS OF THE
WEALTHBRIEFINGASIA
EAM AWARDS FOR
EXCELLENCE 2022



OCTOBER 2022



Efinity Capital 

Life is better with Efinity

Spend time on the things that matter,
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 **WealthBriefingAsia EAM**
AWARDS 2022

— WINNER —

SERVICING GCC CLIENTS
CLIENT REPORTING

www.efinitycap.com

ACHIEVING GREAT UNDERSTANDING BETWEEN CLIENTS AND ADVISORS AT EFINITY CAPITAL

WealthBriefingAsia Group Editor Tom Burroughes talks to Edwin Ng, CEO of **Efinity Capital**, on the reasons for the firm's success.

Please explain what you think makes your firm successful in its chosen field?

All our clients are serviced by a dedicated team, which includes not just the relationship manager and assistant, but also a product specialist and senior management. The complimentary team approach is utilised throughout, from internal portfolio review sessions, weekly market updates to the regular client meetings.

What have been the main obstacles you had to overcome and how did you do so to reach this level?

It is important to assure clients that we are a properly managed firm and that we bring value. As such, client performance, ensuring every client interaction is well prepared and outcome positive, client touch points (website, chat platforms, market updates, reviews, etc) executed well and properly followed through, becomes a given.

As a team, Efinity works hard to ensure that the client experience is consistent for all clients. This is done through many rounds of pre-meetings and regular reviews of the portfolios, internal processes, and platforms.

What are the main contributions you think you bring to the wealth management industry?

We bring a new model into the business in which we use a team approach, set long term sustainable goals and client performance as our KPIs. Our goal is to work with our clients to achieve a sustainable return over the entire investment horizon.

How do awards such as this make a difference to your firm and your colleagues?

Efinity is honored and proud to be receiving two prestigious awards from *WealthbriefingAsia*. They serve as an endorsement to what we believe in doing and the team stays committed to continue focusing on the things that matter and value add to our clients.

Where in the world do you operate – are you mainly a domestic player or international?

We are licensed and based in Singapore, servicing international clients. Currently we are focused in the Greater China region, including Taiwan.

What does success look like to you – can this be measured in hard numbers, or in qualitative ways, or both?

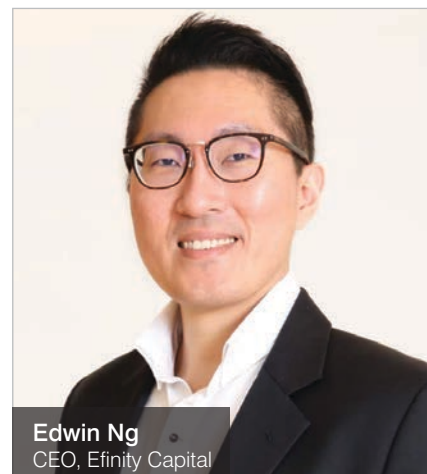
We believe that many clients diversify their assets with different bankers because they have not found the right firm/setup to rely on. It takes trust, track record and competencies to be able to get the clients to say “yes, I want you to manage all my assets”, so creating client performance and having clients consolidate their assets with Efinity would be a good indicator of success.

Whom do you look to in terms of ideas and inspiration? What other business sectors do you follow for ideas?

Singapore is a great role model/inspiration for all businesses. Stable governance, coupled with strategic long-term planning and strong execution capabilities has allowed us to become one of the best managed First World countries. Through COVID, the country has shown leadership, resilience, and led us to be better positioned post pandemic. For many independent asset managers and multi-family offices, we are somewhat like how Singapore started, with limited resources and many battles to fight. Pragmatic approach, getting the best team and focusing on client performance should set us on the right path.

What position would you like your firm to hold in its sector in five years' time?

Efinity envision ourselves to be the Hermes of family offices, We have set clear strategies on how we want to grow the business sustainably and to become a premium brand. Together with the best talents, coupled with robust risk



Edwin Ng
CEO, Efinity Capital

framework and platforms, we aspire to be the best-in-class for client experience and portfolio performance. We want to become the go-to for top bankers looking to do more for their clients.

Can you sum up the philosophy that sums up your firm/you the best?

Our role is to support our clients to achieve their financial and wealth planning goals. It is important that we create clear Efinity DNA and have a clear understanding of our positioning and value add before we set out to engage our clients.

We have to remember that everything starts with knowing the clients well, understanding their needs, getting close to them and their family because at the end of the day, we are in the people business.

Emphasising on the human aspect allows us to gain trust, credibility so that we can effectively tailor the most appropriate solution to them. With Efinity, its personal. ■





WINNER: Carret Private Capital Ltd



WINNER: Crossinvest (Asia)



WINNER: Efinity Capital



WINNER: Fargo Wealth Group



THE WEALTHBRIEFINGASIA EAM AWARDS WINNERS 2022

WINNERS: PAN-ASIA CATEGORIES (COMPANY)

OVERALL EXTERNAL ASSET MANAGER (EAM)



GROWTH STRATEGY



ASSETS UNDER US\$ 500 MILLION AuM



MARCUARD
HERITAGE



NEWCOMER



ASSETS BETWEEN US\$ 1 AND 5 BILLION AuM



WINNERS: TECHNOLOGY CATEGORIES (IN-HOUSE)

INNOVATIVE USE OF TECHNOLOGY



CLIENT COMMUNICATIONS



CLIENT REPORTING



OVERALL DIGITAL ENGAGEMENT



WINNERS: INTERNATIONAL CATEGORIES (COMPANY)

SERVICING MAINLAND CHINA BASED CLIENTS

華港財富
HUAGANGCAIFU



SERVICING GCC CLIENTS

Efinity Capital



SERVICING JAPANESE CLIENTS

TriLake Partners
Wealth managers



SERVICING CLIENTS FROM VIETNAM



SERVICING EUROPEAN CLIENTS

TriLake Partners
Wealth managers



SERVICING CLIENTS FROM SINGAPORE



WINNERS: TEAM-BASED CATEGORIES

INVESTMENT PROCESS

Schroders
Wealth Management



CLIENT SERVICE



PORTFOLIO MANAGEMENT

MARCUARD
HERITAGE



WEALTH PLANNING



ESG/SUSTAINABILITY INVESTMENT STRATEGY

Schroders
Wealth Management



DIVERSITY PROGRAMME

華港財富
HUAGANGCAIFU





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