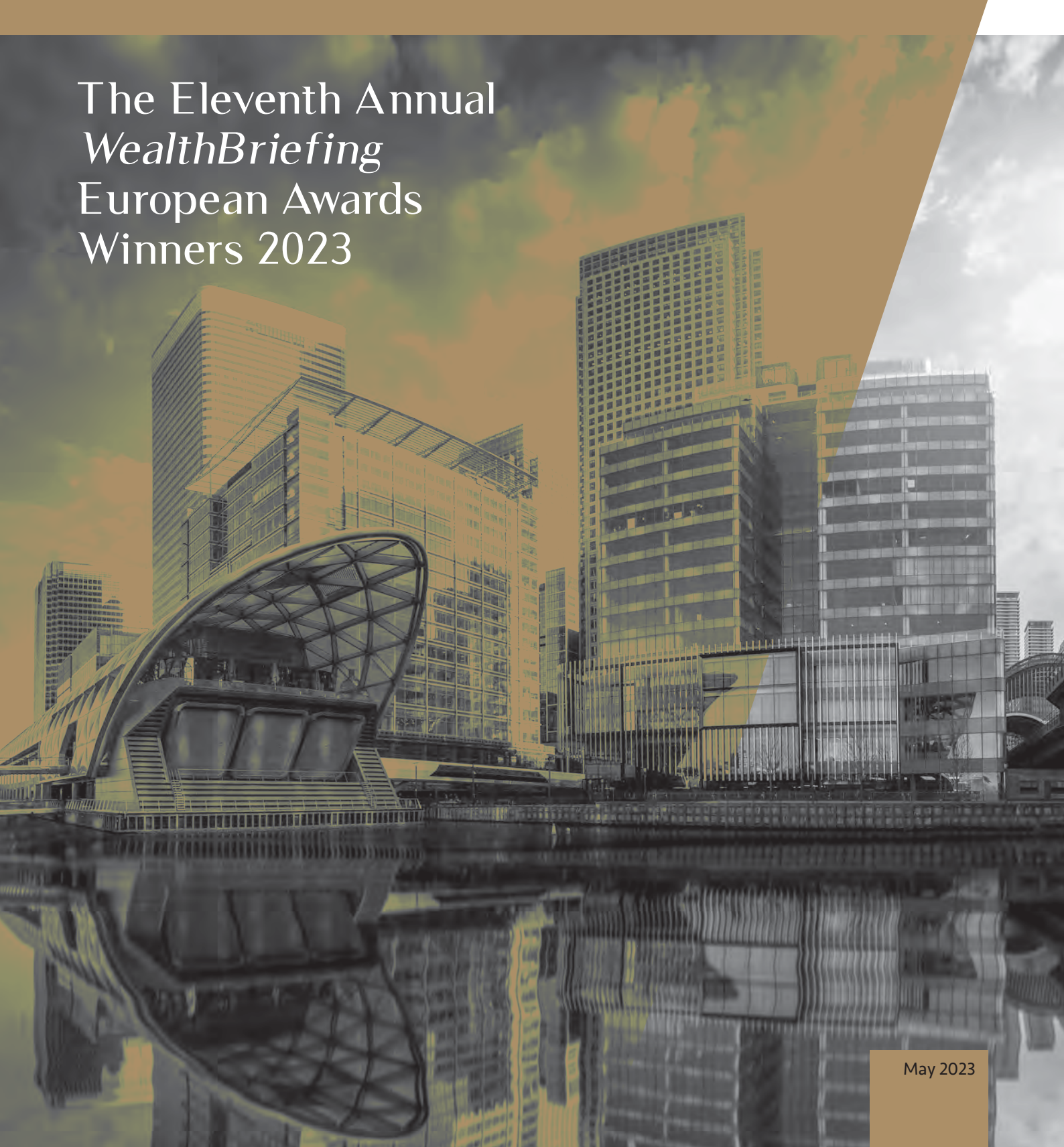




ACCLAIM

RECOGNISING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY
THROUGH THE *WealthBriefing* AWARDS PROGRAMME

The Eleventh Annual
WealthBriefing
European Awards
Winners 2023



May 2023



Rethinking Wealth Management

A modern, unconflicted
Private Investment Office.
Focused on providing
the best client experience
possible. Jointly owned by
our team and our clients.

Established in December 2013, we offer our clients truly independent wealth management services. We focus on UK centric clients or those with significant UK interests, and can manage investments both onshore and offshore. Investing alongside our clients means we share a common passion for long-term investment performance – and we are proud to be a signatory of the UN Principles for Responsible Investment.

As a modern business, we have a younger client base who are forward-thinking and take an active interest in their finances and investments. Our clients are typically entrepreneurs, business owners and finance professionals, with over 70% of our current relationships from these backgrounds.

Discretionary Management, Advisory
Investments and Family Office Services

32 Grosvenor Gardens
London, SW1W 0DH
www.lpio.co.uk

020 3909 7500
info@lpio.co.uk



Lincoln Private
Investment Office
London

Continuous Tech Improvements To Enhance Client Experience



Becky Robbins
Partner and Chief Operations Officer
Lincoln Private Investment Office



"I'm proud of our team and I'm thrilled that at Lincoln we are fairly evenly split between men and women."

Please explain why you think your firm has been able to achieve a high level of success?

Ross Elder, Fred Hervey and I founded Lincoln Private Investment Office 9 years ago with one aim: to make wealth management work for our clients. We wanted to create a genuinely independent wealth management firm which provided a personal service on an individual basis to our clients.

As Chief Operating Officer, every decision I make is first and foremost for the benefit of our current clients. We strive for continuous improvement particularly in technology to bypass inefficiencies and to enhance our clients' experience. My aim has consistently been to build process and technology to allow advisers to concentrate on their day jobs, looking after their clients to an exceptional standard. If we continue to do this, together with providing excellent investment performance, then we will deliver our goals to our clients and Lincoln will continue its ambitions to be the best – but not the biggest!

Having created and developed our own CRM system right at the start of the business, we have since made developments and increased automation enabling us to improve control, decrease risk and to give the team more time to focus on looking after their clients. We built our own Lincoln Portal for clients in 2022 and continue to develop it allowing clients to access their reports and information in a secure manner.

In my role, I am also responsible for compliance which has been both challenging and fascinating given the regulatory changes

that have been introduced since we launched the firm, most recently with consumer duty.

What are your ambitions for the business?

My aim is for the business to have the best operational platform and processes in the industry and for our clients to know that their information is secure, yet they are able to transact efficiently with the team in a personalised way.

How do you measure success?

The measurement of success for me personally, is to be working with the best people and having a shared goal of wanting to build the best private investment office at the same time as raising my two young children. I try make the most of both sides of my life, as a mother and COO, and I am never happier than when I'm busy with lots of things on the go at the same time.

What has led to your firm's success and what role did your colleagues play?

At Lincoln, the culture of the business is really important. The culture is built on the central theme of putting our clients at the heart of everything we do. I'm proud of our team and I'm thrilled that at Lincoln we are fairly evenly split between men and women.

I'm excited about being able to help develop all of the team and give them the opportunities to move through to more senior positions as the business grows.



WEALTHBRIEFING - ALWAYS AT THE CENTRE OF YOUR 360° VIEW ON THE WEALTH MANAGEMENT LANDSCAPE

With 60,000 global subscribers, *WealthBriefing* is the world's largest subscription news and thought-leadership network for the wealth management sector

Register for a free trial
www.wealthbriefing.com

FamilyWealthReport
North American Family Office Intelligence

WealthBriefingAsia
Global Perspective, Regional Focus