

EXECUTIVE PARTNERS

# Private Banking Career Intelligence

GLOBAL MARKET BENCHMARKS 2024–2025

Comprehensive market intelligence for senior private banking professionals evaluating career moves across Geneva, Zurich, London, New York, Miami, Singapore, Hong Kong, Dubai/Abu Dhabi, Paris, Madrid and Lisbon.

# Global Market Benchmarks

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APPROXIMATE 2024–2025 PRACTICE RANGES USED BY BANKS IN FRONT-OFFICE  
HIRING



## Switzerland – Geneva & Zurich

ROA **60–85 bps**

AUM per RM **CHF 250–600M**

Portability (12m) **20–40%**

Licensing **LSFin / SAQ certification**

Focus **Onshore UHNW,  
institutional-quality  
portfolios**



## United Kingdom – London

ROA **55–75 bps**

AUM per RM **£150–500M**

Portability **10–25%**

Licensing **FCA CF30 (sponsor  
bank)**

Focus **Non-dom, family offices,  
multi-jurisdiction HNW**



## Singapore

ROA **80–110 bps**

AUM per RM **USD 180–450M**

Portability **15–30%**

Licensing **MAS RNF / Rep licence**

Strength **Highest ROA globally;  
Asia hub**



## Hong Kong

ROA **70–95 bps**

AUM per RM **USD 150–400M**

Portability **20–35%**

Licensing **SFC Type 1 & 4**

Focus **China & North Asia offshore  
UHNW**

 **Dubai / Abu Dhabi**

ROA **45–65 bps**

AUM per RM **USD 120–350M**

Portability **30–50%**

Licensing **DFSA / ADGM**

Strength **Highest mobility & client relocation**

 **United States – New York & Miami**

ROA **65–85 bps**

AUM per RM **USD 200–600M**

Portability **10–20%**

Licensing **FINRA Series 7/66 (or onboarding path)**

Focus **US onshore & LatAm offshore (Miami)**

 **Euro Wealth Hubs – Paris, Madrid, Lisbon**

ROA **55–75 bps**

AUM per RM **EUR 150–350M**

Portability **10–25%**

Licensing **MiFID II (local regulator)**

Focus **EU-resident HNW & entrepreneurs**

# AUM Portability Framework

WHAT BANKS EVALUATE FIRST WHEN CONSIDERING A MOVE

- ✓ **Booking Centre Breakdown:** Switzerland (Geneva/Zurich onshore & offshore), London, Monaco, Luxembourg, Singapore, Hong Kong, Dubai/Abu Dhabi, New York, Miami, plus EU hubs (Paris, Madrid, Lisbon). Priority booking centres with highest strategic value: **CH Onshore, Singapore, Dubai, New York, London.**
- ✓ **Client Categorisation:** UHNW (>USD 30M) shows strongest portability. HNW (USD 5–30M) remains core hiring pool. Affluent (<USD 5M) is usually lower priority. Banks favour UHNW & multi-booking-centre clients with complex, cross-border needs.
- ✓ **Jurisdictional Loyalty Trends:** Highest client mobility and portability: **Dubai/Abu Dhabi, Singapore, Hong Kong, Monaco.** Moderate: CH offshore, LatAm offshore (Miami), Euro hubs. More institutional loyalty and slower portability: CH onshore, UK, US onshore.

## Revenue & P&L Readiness

BANKS REQUIRE FULL TRANSPARENCY BEFORE MOVING TO OFFER STAGE

- ✓ **Revenue Documentation (Last 12–24 Months):** Gross revenues by client and by booking centre, net revenues after retrocessions, ROA calculation, and revenue concentration (top 10 clients % of total).
- ✓ **Product Mix Analysis:** Advisory vs. Discretionary split, structured products share of revenues, alternatives allocation (PE/HF/real assets), and Lombard loan usage (global UHNW average often 10–20% of AUM).
- ✓ **Compliance Score:** FINMA/FCA/MAS/SFC/DFSA or local regulator history, internal cross-border audits, client complaints, past remediation, exit clauses and non-solicitation terms.
- ✓ **Pipeline Maturity:** AUM realistically ready to follow within 3, 6 and 12 months, warm prospects, new-money potential and transition risk scenario planning (by market: Geneva, Zurich, London, New York, Miami, Singapore, Hong Kong, Dubai, Paris, Madrid, Lisbon).

# Compensation Benchmarks

INDICATIVE 2024–2025 RANGES FOR SENIOR PRIVATE BANKERS

MARKET	BASE SALARY (SENIOR RM)	BONUS RANGE	REVENUE SHARING
瑞士 <b>Switzerland – Geneva &amp; Zurich</b>	CHF 160–280k Team Heads: CHF 300–450k	30–120%	5–12% (higher at boutiques)
英国 <b>London</b>	£120–220k	30–100%	Revenue share at specialist platforms
美国 <b>New York &amp; Miami</b>	USD 180–300k	40–150%	Equity or profit participation possible
阿联酋 <b>Dubai / Abu Dhabi</b>	USD 160–240k	40–120%	10–20% rev. share (highest globally at boutiques)
新加坡 <b>Singapore</b>	SGD 180–320k	40–120%	Variable by institution
中国香港 <b>Hong Kong</b>	HKD 1.2–2.5M	40–120%	Variable by institution
西班牙 / 法国 / 葡萄牙 <b>Paris / Madrid / Lisbon</b>	EUR 120–220k	30–100%	Selective revenue sharing at boutiques

# Candidate Readiness Scorecard

SELF-ASSESSMENT FRAMEWORK — RATE EACH CRITERION 1–5

Banks typically advance candidates scoring **≥ 28 / 40**. Use this scorecard to benchmark your readiness before engaging in a move.

AUM Portability (12–18 months)

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UHNW / HNW Client Quality

--- / 5

Multi-Booking-Centre Relevance

--- / 5

Revenue Stability (3-year track)

--- / 5

Lombard / Structured Product  
Expertise

--- / 5

Regulatory Portability

--- / 5

Geographical Mobility (CH, UK, US,  
ME, Asia, EU)

--- / 5

Cultural Fit with Target Platform

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# Required Documentation

## ESSENTIAL MATERIALS BEFORE ENGAGING WITH A NEW PLATFORM

- ✓ Updated CV (private banking format with AUM and market coverage for Geneva, Zurich, London, New York, Miami, Singapore, Hong Kong, Dubai, Paris, Madrid, Lisbon).
- ✓ Last 2 years revenue sheets (gross & net), ideally by booking centre and by client tier.
- ✓ AUM breakdown by booking centre and client tier (UHNW / HNW / Affluent).
- ✓ Pipeline list with estimated probability and timing of transfer.
- ✓ Compliance declarations, regulatory history, and cross-border training records.
- ✓ Passport and current residency status documentation for relevant jurisdictions.

## Critical Red Flags Banks Screen For

- ✗ Total AUM below ~CHF 150M (for Switzerland/Singapore top platforms).
- ✗ No UHNW clients or limited multi-booking-centre relevance.
- ✗ No documented portability plan or transition strategy by market.
- ✗ Open compliance issues, regulatory sanctions, or unresolved litigation.
- ✗ Unrealistic compensation expectations vs. benchmark ranges.
- ✗ No credible 3-year business plan (by geography and booking centre).
- ✗ Reputation concerns, frequent moves or documented team conflict.

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