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The Importance Of Relationship Banking In A Digital World

Roger Weatherby, CEO, Weatherbys Bank

Thursday, 19 January 2023



A Word From Today's Chairman

Hugh Morris
Senior Research Partner
Z/Yen Group





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Today's Agenda



- 10:00 – 10:05 Chairman's Introduction
- 10:05 – 10:25 Keynote Presentation – Roger Weatherby
- 10:25 – 10:45 Question & Answer



Today's Speaker

Roger Weatherby
CEO
Weatherbys Bank



The importance of relationship banking in a digital world



Our history

1770

James Weatherby appointed by the Jockey Club as Secretary

1791

James published The General Stud Book for racing

1979

The seventh generation of the Weatherbys joined

1994

Weatherbys expanded into banking

1997

Asset finance subsidiary, Arkle, established

2012

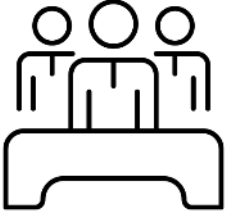
Weatherbys Hamilton insurance partnership established

2020

Weatherbys celebrated its 250th anniversary



Overview: Weatherbys Private Bank



263

Members
of staff



4,000

Private Bank
clients



Digital vs. Relationship Banking

- Simple vs. Complex
- Rigid vs. Flexible
- Transactional vs. Advice
- Value Add
- **100% Digital 100% Human**



What sets us apart

- **44 clients** per banker
- **97%*** of calls answered within 3 rings
- Banking teams **advise clients** rather than sell products
- **Low cost investment solutions** for clients
- Strong in-house **global tracker portfolio performance**

*From 1st June 2021 to 31st May 2022



Case studies

Fraud

BT scam. Fraudster called us requesting payments but we knew this wasn't the client by the tone of the conversation

Exceptional personal service

Elderly client blocked their card at a petrol station. Banker drove to the petrol station, paid the bill and unblocked the card.

Bespoke lending

Penicuik Estate, Edinburgh. Bespoke £7m loan for a renovation project.



A black and white photograph of a building facade. The building features a decorative balcony with a balustrade at the top. Below the balcony is a horizontal band with a repeating scrollwork pattern. The main facade is composed of large, rectangular stone or concrete panels. At the bottom, there is a glass entrance area. A purple rectangular box is overlaid on the center of the image, containing the text "Any questions?".

Any questions?

23

22 SACKVILLE STREET



Comments, Questions & Answers





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Forthcoming Events

- Mon, 23 Jan (11:00-11:45) Friday Is The New Saturday: How A Four-Day Working Week Will Save The Economy
- Tue, 24 Jan (10:00-10:45) Complementary Currencies As Social Innovations - Creating Money For Social-Ecological Transformation
- Wed, 25 Jan (18:00-20:30) Is The Future Of Commercial Insurance Digital?
- Fri, 27 Jan (09:00-14:00) Employee Share Schemes And Trustees Conference Guernsey 2023

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