

Growing International Wealth Mobility Posing New Risks, Warns Rathbones

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- Speaking ahead of the World Economic Forum, CEO of Wealth Camilla Stowell said internationally mobile risk penalties if they fall foul of complex regulation

- Wealth is increasingly borderless, despite patchworks of compliance and reporting, says Stowell, increasing need for careful planning

High net worth individuals, business leaders and professionals may risk significant financial losses – or even legal action – as accelerating global wealth mobility intensifies cross-border regulatory complexity, Camilla Stowell, CEO of Wealth at Rathbones, one of the UK's leading wealth and asset management groups, has warned.

These challenges, she said, are placing new and increasingly onerous burdens on how individuals plan and manage their finances internationally.

Speaking to CBS, as part of Rathbones' participation in CBS's Davos Interviews series for the World Economic Forum, Camilla Stowell highlighted the growing complexities of international wealth mobility and its impact on global financial planning.

She warned that financial planning and investment management must keep pace to help clients navigate regulatory and logistical issues.

"Wealth is moving faster and further than ever before, and this creates risks for those who see the world without borders," Stowell said. "Our advisers bring together specialists across multiple jurisdictions to help clients through complex regulations and tax regimes, ensuring compliance, providing peace of mind and protecting them from costly mistakes."

Rathbones understands that global wealth mobility is reshaping financial strategies worldwide, with record numbers of high-net-worth individuals relocating internationally. In 2025 alone, the UK saw a net outflow of 16,500 millionaires, equating to \$91.8 billion in investable wealth, while jurisdictions such as the United States and UAE experienced corresponding inflows. At the same time, an estimated 220,000 US citizens are living in the UK, around 25,000 of which hold

investible assets of more than £300,000. By 2030 this number is set to rise to as many as 42,000.

This trend is expected to accelerate, driven by younger generations seeking lifestyle, tax, and regulatory advantages, many working in growing sectors such as tech, pharmaceuticals and law.

Rathbones, which recently merged with Investec Wealth & Investment and now manages over £113 billion in client assets, is uniquely positioned to address these challenges. The firm's dual-regulatory model – across the Atlantic – enables it to serve clients under both SEC and FCA regimes, offering tailored strategies for internationally mobile investors. It is also able to support people from South Africa moving to the UK or US, due to its relationship with Investec.

Stowell added: "The mobility of wealth is fundamentally changing how investors approach portfolio management. Our role is to help clients move with confidence, ensuring their investments remain aligned with their goals, wherever they are in the world."

As global leaders convene in Davos to discuss collaborative solutions to economic and sustainability challenges, Rathbones is advocating for greater awareness of the implications of wealth mobility and the need for expert guidance in navigating this evolving landscape. As one of the UK's leading wealth and asset managers, Rathbones provides solutions for those seeking cross-border wealth management.

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About Rathbones rathbones.com

Rathbones Group Plc (Rathbones) is one of the UK's leading providers of investment and wealth management services for private clients (individuals and families), charities, trustees, and professional partners. Rathbones' purpose is to help more people invest their money well, so they can live well.

With roots dating back to 1742, the company has been trusted for generations to manage, preserve and grow its clients' wealth. Services include discretionary investment management,

fund management, tax planning, trust and company management, financial advice and banking services. Rathbones also supports financial advisers in its aim to deliver positive outcomes for their clients.

Rathbones manages £115.6 billion* of client assets, including £16.6 billion through its asset management arm, Rathbones Asset Management Limited. A FTSE 250 company, Rathbones employs over 3,300 professionals, including around 750 investment professionals in over 20 offices across the UK and the Channel Islands, offering clients high-quality, personalised wealth management services.

*As of December 31, 2025

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