

# WINDMILL FAMILY OFFICE



*In Calm Judgement, Strength*

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## **Family-Office-Friendly Accountancy Firms in the UK, EU and US: An Evidence Review**

*Which Accountancy Firms Serve Family Offices Well?*

*What the Public Evidence Can and Cannot Establish*

01 October 2026

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## Executive Summary

The evidence on accountancy firms sits between the banking and legal evidence in strength. A research-led directory ranks accountants for wealthy families, but it has no family office category, its coverage outside the UK and US is thin, and the main award programme in the field gives significant weight to public voting.

**Purpose.** This review establishes what public research identifies accountancy and tax advisory firms in the UK, EU and US as particularly suited to family offices, how reliable that research is, and how a principal should use it when appointing or reviewing accountants.

**Method.** A structured desk review of three evidence classes: (1) the Chambers High Net Worth *Accountants & Tax Advisers* rankings; (2) private wealth awards with accountancy categories, principally STEP and Citywealth; and (3) family office surveys addressing outsourced services. Each source was coded for publisher, basis of assessment, independence and comparability, as in the companion papers.

### Findings.

- Chambers High Net Worth ranks accountancy firms advising wealthy individuals, families and family offices [6][9]. In the UK, four firms hold Band 1: Andersen, Crowe, Forvis Mazars and PKF Littlejohn, among 15 ranked [1]. In the US nationwide table, five firms share Band 1: Andersen, BDO, Deloitte, EY and PwC [3].
- EU coverage is sparse in the public tables reviewed: Germany ranks one firm, Ebner Stolz [6]; Austria ranks KPMG and LeitnerLeitner in Band 1 [7].
- Award recognition in the UK rotates among a stable group of mid-tier and specialist firms. Saffery won STEP Accountancy Team of the Year in 2026 [12]. Citywealth's Accountancy Firm of the Year went to Dixon Wilson in 2024, Blick Rothenberg in 2025 and EY Private Client Services in 2026 [17].
- Andersen is the only firm in Band 1 in both the UK and US tables [1][3]. Crowe combines UK Band 1 with Citywealth Accountant of the Year in 2026 [1][18].
- Family office surveys confirm that accounting is among the first functions set up or outsourced [22]. None rates named accountancy firms.

**Interpretation.** The directory is the strongest public signal, but it ranks private client accountancy in general, not family office capability specifically. Awards add corroboration but weaker independence. Award winners and directory top-band firms overlap only partly, so neither source alone identifies the strongest firms.

**Recommendations.** Build a shortlist from the Chambers tables and the recurring UK award winners. Qualify each firm against the family office's own requirements: consolidated reporting across entities, multi-jurisdiction tax compliance, audit independence, the named partner and the depth of any dedicated family office unit. Validate through peer references and a defined first engagement.

# 1. Introduction

This section sets out why the accountancy relationship is structurally central to a family office, why its quality is hard to judge from outside, and the three questions the review addresses.

## 1.1 Background

The accountant is the family office's control function. Consolidated reporting across holding companies, trusts, partnerships and operating businesses; tax compliance in every jurisdiction where the family has residence, assets or income; audit of entities that require it; and, increasingly, outsourced bookkeeping, bill payment and treasury all sit with the accountancy relationship. Errors in this function surface as tax exposure, reporting failures and loss of control over the family's true position.

The work also spans two very different service models. Large firms offer breadth: audit, tax, transaction services and multi-jurisdiction networks. Specialist private client firms offer continuity, partner access and depth in personal and trust taxation. Many family offices need elements of both.

## 1.2 Rationale

Every large and mid-tier firm markets private client or family office services, and several now run dedicated family office units. The principal's problem is distinguishing firms that can run the accounting and tax architecture of a multi-entity, multi-jurisdiction family from firms that do individual tax returns well.

This review completes a series of three, alongside the author's reviews of banks and law firms, and applies the same method.

## 1.3 Research questions

1. **RQ1.** What published rankings, awards or research identify UK, EU and US accountancy firms as particularly suited to family offices?
2. **RQ2.** How independent and comparable is that evidence, and how does it compare with the evidence on banks and law firms?
3. **RQ3.** What can a principal reliably conclude from it, and what must be established by other means?

## 1.4 Terms

*Accountancy firm* includes accountancy practices and tax advisory firms that are not law firms. Tax advice delivered by law firms is covered in the companion legal review. *Family-office-friendly* is used operationally, as in the companion papers: a firm with dedicated capability for family offices, recognised for it by an independent third party.

## 2. Literature Survey and Background

The published material on accountancy firms and family offices falls into three bodies of work. The accountancy market has no directory industry of its own comparable to the legal directories; its main research-led ranking is a section within a legal publisher's private wealth guide.

### 2.1 Directory rankings

**Chambers High Net Worth, Accountants & Tax Advisers.** Chambers High Net Worth is principally a legal guide, but it also ranks other advisers to wealthy families, including accountancy firms, private banks, wealth managers and trust companies [9][10]. Its Accountants & Tax Advisers category covers firms providing audit, accounting, tax advice, compliance and filing to wealthy individuals, families and family offices [6]. Tables exist at UK-wide and US nationwide level, for selected US states, and for a limited number of other jurisdictions [1][3][5][6][7]. Chambers' general methodology combines submissions, nominated referee interviews, client satisfaction data and market reputation [8].

There is no family-office-specific accountancy category in the tables reviewed. Separately, Chambers ranks law firms for private client tax [11]; those firms are covered in the companion legal review.

The Legal 500 does not rank accountancy firms. No equivalent research-led directory for private client accountancy was identified.

### 2.2 Private wealth awards

**STEP Private Client Awards.** STEP runs separate Accountancy Team of the Year categories for large firms (more than 1,000 staff globally) and midsize firms [16]. Entries address three equally weighted criteria: outcomes for private clients, innovation in service delivery, and client relationships and ethics, supported by client testimonials or case studies [16]. STEP describes a multi-phase judging process running over six months [15].

**Citywealth Magic Circle Awards.** Citywealth runs Accountancy Firm of the Year, Accountant of the Year and Tax Advisory Firm of the Year [17]. Its firm category is assessed on growth, development and innovation supported by metrics [20]. Citywealth stated that for 2026 its judging panel would sit alongside an online public vote carrying significant weight in the final decision [19].

**Family Wealth Report Awards.** The US-focused programme includes an Accountancy Advisor category [21].

### 2.3 Family office surveys touching on accountancy

Family office surveys published by financial institutions address outsourcing in general terms. A 2025 BNY Wealth study of 146 family offices found that accounting and legal services are typically established early in a family office's life [22]. Citi's 2025 report, covering 346 family offices, found many considering external suppliers while keeping decision-making in-house [23]. Accountancy firms also publish family office research; KPMG's 2025 compensation

benchmark, with Agreus, surveyed 585 family office professionals [24]. None of these rates named accountancy firms.

## **2.4 The gap**

The accountancy literature has a research-led ranking, but not a family office category, and not the depth of jurisdictional coverage the legal market enjoys. As with banks and law firms, no study asks family offices to rate multiple accountancy firms on a common basis.

## 3. Methods

The review was a structured desk study of publicly available sources, conducted on 1 October 2026. It applies the method of the companion banking and legal reviews so that the three evidence bases can be compared.

### 3.1 Search procedure

1. **Directory search.** Retrieval of Chambers High Net Worth *Accountants & Tax Advisers* tables for UK-wide, USA Nationwide and Germany [1][3][6], with department profiles for firms whose profiles carried family office commentary [2][4][5][7]. A Swiss table was sought but not available at the expected address.
2. **Directory methodology and scope.** Retrieval of the Chambers methodology [8] and of statements on the guide's coverage of non-legal advisers [9][10].
3. **Award search.** Retrieval of STEP Private Client Awards winners and finalists for 2025 and 2026, and their category criteria and judging description [12]–[16]; Citywealth Magic Circle Awards results for 2023 to 2026, with judging notes and category criteria [17]–[20]; and the Family Wealth Report Awards 2026 [21].
4. **Survey search.** Web searches for 2025 family office surveys addressing outsourced accounting and advisers [22]–[24].

### 3.2 Inclusion criteria

- Identifiable publisher with a stated cycle or date.
- Coverage of accountancy or tax advisory firms serving private clients in the UK, EU or US.
- For directories: a category covering accountancy services to wealthy families or family offices.
- For awards: an accountancy or tax advisory category within a private wealth programme, with stated criteria.

Excluded: general accountancy league tables based on fee income, audit market rankings, and awards without a private client dimension.

### 3.3 Coding

| Dimension | Question asked                          | Scale                                                                          |
|-----------|-----------------------------------------|--------------------------------------------------------------------------------|
| Publisher | Who produced it, and how is it funded?  | Directory · award organiser · professional body · firm · financial institution |
| Basis     | What evidence underpins the assessment? | Submissions · referee interviews · judging panel · public vote · survey        |

|                      |                                                                                  |                                 |
|----------------------|----------------------------------------------------------------------------------|---------------------------------|
| <b>Independence</b>  | Is the assessor independent of the firms assessed, and who selects the evidence? | High · partial · low            |
| <b>Comparability</b> | Does it allow firms to be compared on a common basis?                            | Yes · within category only · no |

Coding is the author's judgement, applied consistently with the companion reviews. It is recorded in Appendix B.

### 3.4 Limitations of method

Public Chambers tables do not always display the band of every ranked firm; where a band was not displayed, only ranked status is reported. EU and Swiss coverage was limited to the tables publicly retrievable. Award results were taken from organisers' and trade press pages. No firms or family offices were interviewed.

## 4. Results

The search identified Chambers accountancy tables for the UK, the US and two EU jurisdictions, three award programmes with accountancy categories, and three surveys touching on outsourced services. No family-office-specific accountancy ranking and no independent multi-firm client study was found. Results are reported without interpretation.

### 4.1 United Kingdom: Chambers High Net Worth, Accountants & Tax Advisers

The UK-wide table ranks 15 firms [1].

| Position                                            | Firms                                                                                                                    |
|-----------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| <b>Band 1</b>                                       | Andersen (four years ranked), Crowe (four years), Forvis Mazars (one year), PKF Littlejohn (two years) [1][2]            |
| <b>Ranked, band not displayed in public extract</b> | BDO, BKL, Blick Rothenberg, Buzzacott, Deloitte, Dixon Wilson, KPMG, Mercer & Hole, Rawlinson & Hunter, S&W, Saffery [1] |

Chambers describes Andersen as a global private client adviser with a strong UK high net worth tax offering [2].

### 4.2 United States: Chambers High Net Worth, Accountants & Tax Advisers

| Table                     | Band 1 firms                                                   | Family office reference                                                                                                                              |
|---------------------------|----------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>USA Nationwide [3]</b> | Andersen, BDO, Deloitte, Ernst & Young, PricewaterhouseCoopers | BDO described as a prominent adviser to international HNW individuals, families and family offices; a respondent confirms its family office work [4] |

**New Jersey**  
**(example of state** EisnerAmper  
**table) [5]**

Private client tax advisory and accountancy  
 across US and international offices

### 4.3 European Union: Chambers High Net Worth, Accountants & Tax Advisers

| Jurisdiction   | Ranked firms                              | Note                                                                                                               |
|----------------|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| <b>Germany</b> | Ebner Stolz, Band 1, sole firm ranked [6] | Category defined as audit, accounting, tax and compliance for wealthy individuals, families and family offices [6] |
| <b>Austria</b> | KPMG and LeitnerLeitner, Band 1 [7]       | KPMG cited for inheritance planning, tax investigations and cross-border matters [7]                               |

### 4.4 STEP Private Client Awards, accountancy categories

| Cycle       | Category                                    | Winner or finalists                                                                                               |
|-------------|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| <b>2026</b> | Accountancy Team of the Year                | Saffery (winner), cited for international tax, succession planning, family governance and dispute resolution [12] |
| <b>2026</b> | Accountancy Team of the Year (midsize)      | Finalists include 4Tax, CLA Global TS and Rawlinson & Hunter [14]                                                 |
| <b>2025</b> | Accountancy Team of the Year (large firm)   | BDO [13]                                                                                                          |
| <b>2025</b> | Accountancy Team of the Year (midsize firm) | Grassi [13]                                                                                                       |

### 4.5 Citywealth Magic Circle Awards, accountancy categories

| Cycle       | Accountancy Firm of the Year                                                                                                            | Other accountancy categories                                                                                     |
|-------------|-----------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| <b>2026</b> | EY Private Client Services (runner-up Dixon Wilson) [17][18]                                                                            | Accountant of the Year: Pete Fairchild, Crowe UK; Tax Advisory Firm: Blick Rothenberg (runner-up Buzzacott) [18] |
| <b>2025</b> | Blick Rothenberg (runner-up Saffery) [17]                                                                                               | —                                                                                                                |
| <b>2024</b> | Dixon Wilson (runner-up Crowe UK) [17]                                                                                                  | —                                                                                                                |
| <b>2023</b> | Large: Deloitte (gold), RSM, Crowe; SME: Rawlinson & Hunter (gold), Blick Rothenberg, Dixon Wilson; USA: Berdon / Citrin Cooperman [17] | —                                                                                                                |

The 2026 Accountant of the Year shortlist included the head of family office at RSM UK [19].

## 4.6 Other programmes

The Family Wealth Report Awards 2026 named PKF O'Connor Davies Family Office as Accountancy Advisor [21].

## 4.7 Family office surveys addressing outsourced services

| Survey                                                                     | Respondents       | Relevant finding                                                                              |
|----------------------------------------------------------------------------|-------------------|-----------------------------------------------------------------------------------------------|
| <b>BNY Wealth family office study, 2025 [22]</b>                           | 146               | Accounting and legal services are typically established early                                 |
| <b>Citi Wealth Global Family Office Report 2025 [23]</b>                   | 346               | Many family offices are considering external suppliers while keeping decision-making in-house |
| <b>KPMG / Agreus Global Family Office Compensation Benchmark 2025 [24]</b> | 585 professionals | Accountancy-firm-produced research on family office staffing and pay                          |

None of the three reports rates named accountancy firms.

## 5. Discussion

The results answer RQ1 with a usable shortlist and RQ2 with a qualified result. The accountancy evidence draws on the same research-led directory as the legal evidence, but without a family office category and with much thinner jurisdictional coverage. Awards are more prominent here than in law, and less independent. This section explains what the evidence supports, where it fails, and how the three markets compare.

### 5.1 What the evidence shows

**United Kingdom.** The UK evidence divides into two groups. The Chambers top band is Andersen, Crowe, Forvis Mazars and PKF Littlejohn [1]. The award record, by contrast, centres on established private client specialists and mid-tier firms: Saffery, Dixon Wilson, Blick Rothenberg and Rawlinson & Hunter recur across STEP and Citywealth over four cycles [12][14][17], alongside EY Private Client Services [18]. All of these are also ranked by Chambers [1]. Crowe is the clearest overlap: Band 1 in Chambers [1], with Citywealth Accountant of the Year in 2026 and runner-up firm in 2024 [17][18].

**United States.** The nationwide table is dominated by large networks: the Big Four plus Andersen and BDO [3]. BDO's profile is the only one in the public extract that references family office work explicitly [4]. For US families, state tables add specialist and regional firms such as EisnerAmper [5].

**European Union.** Coverage is too thin to support a shortlist. Germany ranks a single firm [6]; Austria ranks two [7]. For continental family offices, the accountancy choice in practice follows the jurisdiction's law firm and fiduciary relationships, which are covered more fully in the companion legal review.

**Cross-border.** Andersen is the only firm in Band 1 in both the UK and US nationwide tables [1][3]. For a family with UK and US exposure, cross-border tax competence is the critical capability, and that pairing is the strongest single signal in the evidence.

## 5.2 Why the evidence is weaker than the legal evidence

**No family office category.** The Chambers accountancy tables rank private client accountancy generally [6]. They do not separate firms that can run a multi-entity family office's reporting and compliance from firms that excel at individual tax.

**Thin coverage.** Outside the UK and US, the tables are small or absent in the jurisdictions reviewed [6][7].

**Award independence.** STEP describes a structured, multi-phase judging process with defined criteria [15][16], which makes it the stronger of the two main programmes. Citywealth assesses growth metrics [20] and stated that a public online vote would carry significant weight in 2026 [19]. A public vote rewards mobilisation as much as quality.

## 5.3 Why the evidence still cannot be read as a client-experience ranking

The limitations identified for law firms apply here too. Firms nominate their own Chambers referees and choose what to submit [8]. Firms within a band are listed alphabetically, and the public extract does not show every firm's band [1]. The STEP entry criteria ask for client testimonials and case studies, which the entrant selects [16].

Three further limitations are specific to accountancy.

**Audit independence.** Where a firm audits family entities, independence rules may restrict the advisory services it can provide. A firm that ranks highly for tax advice may not be able to act as both auditor and adviser.

**Service model.** Large networks and specialist firms deliver very different experiences. The directory places them in the same table without distinguishing partner access, continuity or minimum client size.

**Compliance quality is invisible.** The core of the accountancy relationship is accurate, timely compliance and reporting. Neither directories nor awards measure error rates, filing timeliness or the quality of consolidated reporting.

## 5.4 Counterparty incentives

| Actor             | Defines success as                                                                                             | Effect on the evidence                                                   |
|-------------------|----------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|
| Accountancy firms | Recognition that wins private client and family office mandates, including cross-selling of audit and advisory | Referees, testimonials and entries selected to show the firm at its best |
| Chambers          | A credible guide across private wealth advisers                                                                | Rigorous method, but accountancy is a secondary section of a legal guide |

|                                                  |                                                                    |                                                              |
|--------------------------------------------------|--------------------------------------------------------------------|--------------------------------------------------------------|
| <b>STEP</b>                                      | Professional standards and member engagement                       | Structured judging; categories split by firm size            |
| <b>Citywealth</b>                                | A well-attended programme with industry engagement                 | Public voting rewards firms able to mobilise votes           |
| <b>Financial institutions publishing surveys</b> | Thought leadership and client engagement                           | Questions focus on investment behaviour, not adviser quality |
| <b>Family offices</b>                            | Accurate reporting, compliant tax positions, continuity of partner | Their direct ratings of firms are not published              |

## 5.5 The three markets compared

| Dimension                             | Banks                                    | Law firms                                  | Accountancy firms                                           |
|---------------------------------------|------------------------------------------|--------------------------------------------|-------------------------------------------------------------|
| <b>Family-office-specific ranking</b> | Award category only                      | Chambers category, UK and US               | None                                                        |
| <b>Research-led directory</b>         | No                                       | Chambers and Legal 500                     | Chambers section only                                       |
| <b>Client voice in assessment</b>     | Not evident                              | Nominated referee interviews               | Nominated referee interviews; selected testimonials         |
| <b>Coverage beyond UK and US</b>      | Regional awards                          | Strong in Switzerland and major EU markets | Thin                                                        |
| <b>Strongest single signal</b>        | Repeated awards from separate publishers | Multi-year Chambers top band               | Chambers ranking corroborated by repeated award recognition |
| <b>Overall evidential strength</b>    | Weakest                                  | Strongest                                  | Intermediate                                                |

## 5.6 Limitations of this review

- Bands for 11 of the 15 UK-ranked firms were not displayed in the public extract.
- Swiss, French, Dutch, Luxembourg and Irish accountancy tables were not retrieved.
- Award results were taken from organiser and trade press pages; full judging records were not examined.
- No primary data was collected.

## 5.7 Broader meaning

Across all three reviews the pattern holds. The more a market's assessments draw on structured, repeated client interviews, the more useful its public evidence becomes.

Accountancy sits in the middle. The quality that matters most to a family office, the accuracy and reliability of its compliance and reporting, is the quality least visible in any public source.

## 6. Conclusion and Recommendations

### 6.1 Conclusion

This review asked whether public research identifies which UK, EU and US accountancy firms are particularly well suited to family offices. It has established four things.

1. **A credible shortlist exists for the UK and US.** Chambers ranks 15 UK firms, with Andersen, Crowe, Forvis Mazars and PKF Littlejohn in Band 1 [1], and five US nationwide firms, all in Band 1 [3].
2. **Award recognition adds a second, partly overlapping group.** Saffery, Dixon Wilson, Blick Rothenberg, Rawlinson & Hunter, EY Private Client Services and BDO recur in STEP and Citywealth results [12]–[18]. Crowe appears in both the directory top band and the award record [1][18].
3. **The evidence is weaker than for law firms.** There is no family office category, EU coverage is thin, and the most prominent award programme gives weight to public voting [6][7][19].
4. **The most important quality is unmeasured.** No public source assesses the accuracy and reliability of compliance and consolidated reporting.

The practical implication: public evidence can produce a shortlist; only due diligence can produce an appointment.

### 6.2 Recommendations for family office principals

1. **Shortlist from two sources.** Combine the Chambers top bands in each relevant jurisdiction with firms that recur in STEP and Citywealth results. Weight STEP above Citywealth for independence.
2. **Test the family office capability directly.** Ask for evidence of consolidated reporting across multi-entity structures, the reporting technology used, and how many family office clients of comparable complexity the team serves.
3. **Match the service model to the need.** Large networks bring multi-jurisdiction reach and transaction capability. Specialist private client firms bring partner continuity. Decide which matters more, or use both with clear boundaries.
4. **Settle audit and advisory boundaries early.** Where entities require audit, decide whether the auditor will also advise, and confirm independence constraints before appointment.
5. **Prioritise cross-border tax competence.** For families with UK and US exposure, confirm the firm's capability on both sides and how its offices coordinate.
6. **Seek peer references and run a parallel check.** Ask comparable family offices about filing timeliness, errors and partner access. Consider a defined first engagement, such as a review of one entity's compliance, before transferring the full mandate.

7. **Avoid single-firm dependency for critical controls.** Periodic independent review of the family's tax positions by a second firm protects against unchallenged errors.

### 6.3 Recommendations for further research

- A family office category for accountancy, distinguishing multi-entity reporting and compliance capability from individual private client tax, would sharpen the directory evidence.
- An independent survey of family offices rating their accountancy firms on accuracy, timeliness, partner access and cross-border coordination would measure what no current source does.
- Expanded European coverage, particularly for Switzerland, Luxembourg and the Netherlands, would serve continental family offices.

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## Appendices

### Appendix A. Recognition by firm, 2023 to 2026

Firms holding a Chambers Band 1 position, or recognised in two or more of the programmes reviewed (Chambers, STEP, Citywealth, Family Wealth Report).

| Firm                          | Chambers High Net Worth     | STEP                                   | Citywealth                                                                   | Programmes            |
|-------------------------------|-----------------------------|----------------------------------------|------------------------------------------------------------------------------|-----------------------|
| <b>Saffery</b>                | UK ranked [1]               | Accountancy Team of the Year 2026 [12] | Firm runner-up 2025 [17]                                                     | 3                     |
| <b>Rawlinson &amp; Hunter</b> | UK ranked [1]               | Midsized finalist 2026 [14]            | SME gold 2023 [17]                                                           | 3                     |
| <b>Andersen</b>               | UK Band 1; US Band 1 [1][3] | —                                      | —                                                                            | 1 (two jurisdictions) |
| <b>Crowe</b>                  | UK Band 1 [1]               | —                                      | Accountant of the Year 2026; firm runner-up 2024; large bronze 2023 [17][18] | 2                     |
| <b>BDO</b>                    | US Band 1; UK ranked [1][3] | Large firm winner 2025 [13]            | —                                                                            | 2                     |
| <b>EY</b>                     | US Band 1 [3]               | —                                      | Accountancy Firm of the Year 2026 (EY Private Client Services) [18]          | 2                     |
| <b>Deloitte</b>               | US Band 1; UK ranked [1][3] | —                                      | Large gold 2023 [17]                                                         | 2                     |
| <b>Dixon Wilson</b>           | UK ranked [1]               | —                                      | Winner 2024; runner-up 2026; SME bronze 2023 [17]                            | 2                     |
| <b>Blick Rothenberg</b>       | UK ranked [1]               | —                                      | Winner 2025; Tax Advisory Firm 2026; SME silver 2023 [17][18]                | 2                     |
| <b>Buzzacott</b>              | UK ranked [1]               | —                                      | Tax Advisory runner-up 2026 [18]                                             | 2                     |
| <b>Forvis Mazars</b>          | UK Band 1 [1]               | —                                      | —                                                                            | 1                     |
| <b>PKF Littlejohn</b>         | UK Band 1 [1]               | —                                      | —                                                                            | 1                     |

|                              |                                        |   |   |   |
|------------------------------|----------------------------------------|---|---|---|
| <b>PwC</b>                   | US Band 1 [3]                          | — | — | 1 |
| <b>Ebner Stolz</b>           | Germany Band 1 [6]                     | — | — | 1 |
| <b>KPMG / LeitnerLeitner</b> | Austria Band 1 [7]; KPMG UK ranked [1] | — | — | 1 |

The programme count is a corroboration measure, not a quality score. It is sensitive to which programmes a firm enters and does not weight STEP and Citywealth differently.

## Appendix B. Source coding

| Ref           | Source                                       | Publisher type                          | Basis                                                         | Independence   | Comparability            |
|---------------|----------------------------------------------|-----------------------------------------|---------------------------------------------------------------|----------------|--------------------------|
| [1]–[7], [11] | Chambers High Net Worth tables and profiles  | Directory                               | Submissions, nominated referee interviews, market research    | Partial        | Within category, by band |
| [8]–[10]      | Chambers methodology and coverage statements | Directory; firm-published               | Published process                                             | Not applicable | Not applicable           |
| [12]–[16]     | STEP Private Client Awards                   | Professional body                       | Multi-phase judging of submissions with selected testimonials | Partial        | Within category only     |
| [17]–[20]     | Citywealth Magic Circle Awards               | Award organiser                         | Judging panel and public online vote                          | Partial to low | Within category only     |
| [21]          | Family Wealth Report Awards                  | Award organiser                         | Judged submissions                                            | Partial        | Within category only     |
| [22]–[24]     | Family office surveys                        | Financial institution; accountancy firm | Respondent surveys                                            | Low            | No                       |

## Appendix C. Accountancy firm qualification checklist

For converting the shortlist into an appointment.

- Named lead partner, their tenure, and succession within the firm
- Number of family office clients of comparable structure and complexity served by the team

- Consolidated reporting capability across companies, trusts, partnerships and operating businesses, and the technology used
- Tax compliance coverage in every jurisdiction of residence, assets and income, and how network offices coordinate
- Audit and advisory boundaries, and independence constraints if the firm audits family entities
- Filing timeliness and error history, evidenced by peer references
- Fee model, scope definition and reporting cadence
- Data security and confidentiality protocols for family financial information
- Arrangements for periodic independent review of tax positions by a second firm