

Press release

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Dolfin appoints advisory panel amidst continued growth

Dolfin, the independent and agile wealth management platform, has announced the formation of an advisory panel. Four seasoned financial services specialists with impressive reputations - Rodney Baker-Bates, Stephen Kingsley, David Roper, and Roger Sanders OBE – have been appointed to join Dolfin Group co-founder Roman Joukovski on the new panel.

The advisers - whose complementary skills and collective experience span wealth and investment management, consultancy, change management and audit - will work closely with Dolfin's existing board of directors, providing strategic thinking and counsel.

The panel consists of:

- **Rodney Baker-Bates, chairman of insurance broker Willis:** During a 50-year career, Rodney spent a decade in management consulting, moving into banking with Chase Manhattan Bank then Midland Bank. He is a Fellow of the Institute of Chartered Accountants, an Associate of the Institute of Management Consultants and a Fellow of the Chartered Institute of Bankers.
- **Stephen Kingsley, former partner at FTI Consulting:** With 40 years in financial services, Stephen's focus has been on banks and investment firms, as an auditor and consultant, later as a non-executive director and as an expert witness in banking and regulatory disputes. He is a Fellow of the Institute of Chartered Accountants and a Member of the Academy of Experts.
- **David Roper, former financial services partner at PwC:** David has over 30 years' experience in the financial sector focussing on long term savings and wealth management, with extensive experience in regulatory reporting. He currently chairs the Audit Committee of Atom Bank.
- **Roger Sanders OBE, director of workplace distribution and industry affairs at Lighthouse Group:** Roger is also a director of Lighthouse Benefits Ltd, the sponsor of Lighthouse Group's master trust, and trustee at the Corporate Pensions Trust. He was awarded an OBE in 2002 for services to financial services regulation.
- **Roman Joukovski, co-founder of the Dolfin Group:** After 15 years in private client wealth management and investment banking, Roman co-founded the Dolfin Group in 2013. This followed a decade during which he was one of the founders of a small UK wealth manager and was instrumental in growing that business into one of London's largest multi-family offices. Roman's early career was in structured and corporate finance with firms such as Deutsche Bank and Ernst & Young.

"We are thrilled to have attracted an advisory panel of such an extraordinarily high calibre," said Denis Nagy, CEO at Dolfin. "In the last 12 months, we've doubled our footprint in private wealth management with the acquisition of Falcon Private Wealth (UK); extended our Maltese business with an investment services licence upgrade; and delivered the first release of our bespoke wealthtech offering. Each member of our panel brings distinct experience to bear on the challenge of maximising these existing opportunities, while guiding us through the next phase of our growth."

Details on Dolfin's advisory panel can be found [here](#).



About Dolfin

Dolfin is an independent and agile wealth management platform. We provide world-class custody, execution and investment management to private clients, financial advisers and institutional investors.

We pride ourselves on our ability to help, to be a one-stop-shop. This has earned us the status of true partner to our clients, who repeatedly come to us first with their new projects and ideas.

We open investment accounts promptly and safeguard assets; share our infrastructure; provide access to capital markets worldwide; and offer sophisticated investment expertise.

Our platform enables the likes of wealth managers, external asset managers, multi-family offices, small private banks and emerging fund managers to grow their business with simplicity and speed.

Founded as a London-based wealth boutique in 2013, today we offer diversified financial solutions, an international presence, and our own bespoke technology. Although we now look after more than \$2.1bn of client assets and handle around \$650m of brokerage flow every month, the commitment that drove us in those early days endures: we think differently and act faster than most.

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