

Press release

13 May 2019

Dolfin completes the acquisition of Falcon Private Wealth's business, taking client assets to more than \$3bn

Dolfin, the agile and independent wealth management platform, has completed its acquisition of the business of London-based Falcon Private Wealth Ltd.

The transaction expands and diversifies Dolfin's client base considerably, adding around 300 new wealth management accounts to the business, with an additional \$800m of client assets bringing the total of Dolfin's client assets to more than \$3bn.

The completion of this deal is testimony to the flexibility and scalability inherent in Dolfin's platform. Dolfin has the ability to attract and take on sizeable volumes of new business by applying a mix of investment, operational and technology expertise.

The new client base dovetails well with Dolfin's existing international footprint and emerging markets specialism, with concentrations in Asia (30%), UK/Channel Islands (20%) and Eastern Europe (20%), as well as Western/Southern Europe (15%) and Middle East/Africa (15%).

With the transaction complete, 14 members of staff have now joined from Falcon Private Wealth, including several senior wealth managers, further bolstering the breadth of expertise of the Dolfin team.

Denis Nagy, CEO at Dolfin, said: "The successful completion of this deal is important for two reasons. Firstly, it adds scale in terms of high-quality clients and wealth managers, in line with our international and emerging market strategy. Secondly, it demonstrates the huge appeal of our platform to demanding private clients and their advisers from many different parts of the world and – crucially – that, after six years in business, we have the management and execution capability to take on substantial new business despite the operational complexity involved. In my mind, this cements Dolfin's position as one of London's fastest-growing wealth management platforms, the natural partner for clients and private bankers who want to get things done. We look forward to welcoming our new team members, and to offering our new clients both continuity in excellent relationship management and an enhanced range of services."



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 \$3bn 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.

Dolfin is the trading name of Dolfin Financial (UK) Ltd, a company authorised and regulated by the Financial Conduct Authority and registered in England and Wales. Some of the services described are provided by Dolfin Asset Services Ltd, a company registered in Malta authorised and regulated by the Malta Financial Services Authority. Dolfin Financial (UK) and Dolfin Asset Services Ltd are subsidiaries of Dolfin Group Ltd, an exempted company organised under the laws of Bermuda.

More information

Contact

Andrew Carrier

Chief Marketing Officer

Phone: +44 7823 402 502

Email: andrew.carrier@dolfin.com

Twitter: @AndrewCarrier

Media centre

For information about Dolfin and spokespeople's bios, high-resolution photography and an archive of previous press releases, please visit our media centre: dolfin.com/media

More

For more information, visit our website or email marketing@dolfin.com. To keep up-to-date on our latest news and thinking, follow us on any of the following social media:

- [LinkedIn](#)
- [Twitter](#)
- [YouTube](#)
- [Instagram](#)
- [Facebook](#)

