

Press release

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Dolfin hires Richard Webb as Head of Technology

Dolfin, an independent and agile wealth management platform, has appointed Richard Webb as Head of Technology. In the newly created role, Webb will oversee Dolfin's technology and infrastructure strategy and lead the development of its digital wealth management offering.

Webb joins with over 20 years' experience leading IT, change management and digital transformation projects. As a consultant across hedge funds, investment banks and retail banking, he led teams at CQS Management, RBS Global Banking, UBS Investment Bank and Accenture. More recently, Webb has successfully built and managed hedge fund technology platforms for the likes of Rokos Capital Management and COMAC Capital as Head of Enterprise Technology and Chief Technology Officer respectively.

At Dolfin, Webb will report to Amir Nabi, Dolfin's Chief Operating Officer, and be responsible for driving the firm's technology offering and completing the build of its end-to-end wealth management platform. This includes transforming its existing infrastructure, as well as developing and implementing new strategies to evolve Dolfin's operations.

Webb has been working with Dolfin on a consultancy basis since 2018. During this time he led the development of two significant projects:

- myDolfin, which gives clients more visibility and control over their accounts online, and
- Dolfin's CRM onboarding platform, which helps advisers set-up Dolfin accounts for their clients by streamlining processes like KYC and AML.

Both projects are in beta testing now and will be rolled out - like all Dolfin technology is - first to Dolfin's internal teams, then to financial advisers who use the Dolfin platform, and finally to end clients.

Webb said: "Dolfin is using technology to transform the way private clients and their advisers approach wealth management by enhancing rather than replacing human interaction. I see a rare opportunity to harness the firm's resources to create a truly compelling and agile technological offering for the wealth management market."

Nabi said: "Technology has long been at the heart of our approach and a driver of our growth. Richard brings with him impressive industry experience. His addition to our leadership team is testament to our dedication to combining the best of human expertise with the smartest use of technology to make the Dolfin experience second to none for our clients."



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.

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More information

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