

Press release

5 November 2019

Dolfin launches Private Investment Club

Dolfin, an independent and agile wealth management platform, today announced the launch of its Private Investment Club. The new offer is available to existing clients, providing exclusive, pre-screened investment opportunities across a variety of sectors and regions.

Clients can gain access to deals analysed by Dolfin experts through a customised online portal while retaining full control in how much they invest. The offering also gives clients full transparency with the added option to meet directly with the management of potential investee companies.

Investment opportunities can be advised or non-advised and span equity, mezzanine and debt markets across a breadth of sectors including fintech, medtech and agtech, offering diversification and returns uncorrelated to public stock markets. These are spread across geographies from the UK, Europe, Africa and the Far East.

Dolfin has assembled a strong team for private investments, with collective expertise ranging from former entrepreneurs to venture capital and private equity professionals.

Simon Black, Head of Investment Management at Dolfin, said: “The Dolfin Private Investment Club enhances our offering by allowing clients who qualify to construct their own direct venture capital investment portfolio in companies around the world in a number of different sectors. They do this through a user-friendly investor portal with the support of - and access to - Dolfin’s expertise. Many of our more sophisticated clients are concerned about how they can generate real returns over the next five to ten years and we believe that this is part of the solution. Ultimately, the service connects clients to unique sourcing channels so they can uncover new and exciting investment opportunities.”



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 \$3.9bn 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

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