

# Press release

29 January 2020

## **Dolfin empowers family office Altaira Wealth Management with custody, execution and investment advisory**

Dolfin, an independent and agile wealth management platform, provides Geneva-based family office Altaira Wealth Management with custody, execution and investment advisory, showcasing the strength in its family office offering.

Altaira relies on Dolfin to deliver consolidated reporting for each client, even when across multiple custody accounts. By using Dolfin's independent trading desk, Altaira is able to offer well-priced, and highly efficient execution on its investment ideas.

Altaira's investment strategy is also a collaborative effort with Dolfin, which provides regular research and ideas to the Altaira investment team.

**Nick McCall, Dolfin's Head of Wealth Management**, says: "By digitising some of the onboarding process, then combining custody and execution with wealth management, we really control the process from start to finish. Overall, it means family offices who work with us like Altaira – and we treat them very much as if they were part of Dolfin – can provide a much better experience to their own clients."

**Anthony Acampora, CEO, Altaira Wealth Management**, adds: "We are extremely excited about the Dolfin collaboration as their full-service approach makes them a true partner. Another aspect that attracted us to Dolfin was its technology platform and how easily it integrated with our business."



## 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 \$4.3bn 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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