

Paris, June 2nd 2023

## Press Release

### **WEALTH MANAGEMENT COMPANY DAUPHINE AM JOINS RHÉTORÈS GROUP**

**One year after the equity investment of Activa Capital, Rhétorès, managed by Stéphane Rudzinski and Grégory Soudjoukdjian, announces its expansion with a third acquisition: Dauphine AM.**

This transaction represents an important milestone for Rhétorès Group, specialized in wealth management, which sees its assets under management grow to €800 million, including €285 million brought by Dauphine AM.

Founded in 2004 by François-Xavier Legendre, Dauphine AM is a wealth management advisory firm active in Paris, dedicated to senior executives and their families, relying on a complete offer: Wealth Advisory (*Dauphine Patrimoine*) and Asset Management (*Dauphine Asset Management*). Since its creation, the company has experienced strong organic growth, reaching €285 million assets under management. The shareholders of Dauphine AM, François-Xavier Legendre, Séverine Richard-Vitton as well as their associates are reinvesting significantly in the combined Group. Furthermore, François-Xavier Legendre remains the President of Dauphine AM, and Séverine Richard-Vitton becomes the General Secretary of the Group.

This strategic partnership with Dauphine AM perfectly matches with the growth vision of Rhétorès Group: the sense of common values, such as client-centric positioning, integrity and a major ambition to become a key player in the wealth management industry. This new acquisition follows two other successful transactions: the acquisition of Cap Fidelis, in February 2022, a major actor in the wealth management in Lille area, and the integration of Résilience Patrimoine, a firm based in Lille, run by Joachim Martellier, in October the same year.

By welcoming Dauphine AM into the group, Rhétorès is steadily achieving its ambitious target of €1 billion assets under management by the end of the year, strengthening its position through both organic and external growth.

Stéphane Rudzinski and Grégory Soudjoukdjian, Founders of Rhétorès Finance, declared: « *We are extremely delighted to welcome Dauphine AM within Rhétorès Group. This acquisition marks an important step for our strategic growth and reinforces our position in the wealth management industry. We believe without any doubt that the expertise and reputation of Dauphine AM will fit perfectly with our value proposition and allow us to provide better service to our clients and address new challenges. We are pleased to work side by side with the Dauphine Team.* »

François-Xavier Legendre adds: « *Dauphine AM has chosen to merge with Rhétorès Group, to offer a better and more efficient service to its clients. Our job is becoming more complex, and it is clear that this ambitious and competent union is a guarantee of success.* »

Christophe Parier and Alexandre Masson, Managing Partners of Activa Capital, completed: « *We are convinced that this strategic partnership will enhance and create values while offering new opportunities to Rhétorès. We are proud to be part of this success and are delighted to watch the next promising perspectives that this acquisition will offer in the near future.* ».

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#### **Participants**

Rhétorès Finance : Stéphane Rudzinski, Grégory Soudjoukdjian

Dauphine AM : François-Xavier Legendre, Séverine Richard Vitton, Managers

Activa Capital : Christophe Parier, Alexandre Masson, Frédéric Singer, Camille Emin, Julie Perouzel, Alix Minne

Apera Capital : Salim Lemseffer, Alexandre Gallois

#### **Advisors**

M&A: New Co CF (Jean-Louis Duverney, Alexandre Gebelin, Jeeshan Mohamad)

Financial Due Diligence: Eight Advisory (Emmanuel Riou, Alexandre Bengougam)

Legal Corporate Advisory: Degroux Brugère (Augustin Fleytoux, Marguerite Galois Boyé, Emilie Phalier), Claris Avocats (Manfred Noé)

Regulatory Advisory: Astrée Avocats (Marie Callac, Isabelle Lafin)

Legal Financing Advisory: De Pardieu (Sébastien Boullier de Branche, Julien Willemot)

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