

WEALTH MANAGEMENT COMPANY OF THE YEAR

Groupe Quinze - Gestion Privée

Groupe Quinze - Gestion Privée is a wealth management and investments company based in Strasbourg. The independent consultancy offers an innovative approach to asset management, providing wealth advice, savings management for both companies and individuals, and corporate holdings advice. The business adopts a simplified approach using revolutionary digital platforms, and serves non-residents and expatriates both in France and internationally. Founded by chairman and CEO Christophe Brochard, Groupe Quinze is dedicated to offering pragmatism, independence, security and ambition to its clients.



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Simplified asset management

With Groupe Quinze's digital application, clients can easily manage all their investments, bank accounts (regardless of custodian bank), life insurance and financial investments (regardless of the depository institution), and real estate assets. Wealth, tax and estate are updated almost in real time, and are permanently available from the convenience of a smartphone. Meanwhile, the Family Office service supports clients over the long term, managing the assignments of lawyers, notaries and accountants.

A network of external experts

Along with state-of-the-art digital support, the consultancy also offers the support of expert wealth advisors, helping clients with the management of their business, participating in strategic thinking and even piloting legal missions on behalf of the company, intervening in the selection and connection of investment funds where necessary.

Meanwhile, a network of specialists including lawyers and notaries are available for individuals, whether they need to change their marriage contract, make a donation, create a company or change their tax domicile. One interlocutor will manage external specialists to guarantee coherence across any type of project. For international clients, delegated asset management uses tax portable contracts to maintain complete control over funds, no matter the client's country of residence.

Naos – the revolutionary digital safe

Named for the sacred chest that protects the status of the immortal God found in ancient Greek temples, Naos is a unique digital solution offered by Groupe Quinze and used for organising and transferring knowledge of heritage from generation to generation. All vital documents, such as heritage studies, wills, investments, contracts and even photos and recommendations can be deposited, with a transmission mandate associated with each document ensuring communication to your relatives or to the people of your choice in the event of a client's passing.

Judges' comments:

The judges were particularly impressed with Groupe Quinze for blending high-tech and up-to-date digital asset management with the experience and expertise of its employees, to create one of the most convenient and effective private banking and investments experiences for its clients. No matter where in the world its customers are, they have 24/7 access to their assets. Meanwhile, excellent



heritage advice and forward-thinking technology allows clients to build up wealth and pass it on to their loved ones, with the ordering of assignments and a regularly updated confidential report. Only the best portfolio managers are selected using analysis of the real performance of more than 1,160 investment funds around the world, identifying trends and detecting reversals, and personal visits to portfolio management companies in their home office. Businesses can invest directly in the capital of French companies through projects selected exclusively by Groupe Quinze, with an investment philosophy based on the concept of shared success – meaning they will invest alongside clients in each project offered to members of the circle of investors.



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