

# Sale / Merger

Project Name: Athena  
Sector: Asset Management

A mid sized equity focused Asset Management boutique business covering UK, European & Worldwide looking for a buyer / merger



## KEY STRATEGY

- Privately owned, with a successful 30 year track record in the asset management arena and passionate about their free thinking approach, our client, the founder is now looking for a buyer for the business or partnership.

## KEY BUSINESS FEATURES

- **Sector:** Asset Management – Mutual Fund / Unit Trust Focused
- **Staff:** Around 25 employees
- **AUM:** c£550m. **FEEs:** c£3.5m PA
- **Expertise:** Highly experienced team of Fund Managers
- **Fund Focus:**, UK Value, UK Growth, European Equities & ESG.
- **Location:** United Kingdom

## BENEFITS

- Long established and well known brand with good reputation and strong investment track record.
- Particular strength in UK Equities having benefitting from the integration of sustainability and an active engagement approach.
- Access to strong distribution network & strong marketplace recognition amongst advisers and wealth managers.
- Exceptional inhouse research capability.
- Benefits from a broad range of platform access not easy to replicate.
- Opportunity to buy / merge / partner with scalable operating and compliance platform.
- Recently upgrading systems and marketing capability

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In order to obtain the Information Memorandum, please register your interest by completing the Non-Disclosure Agreement and return to:  
[alexbradshaw@forsterchase.com](mailto:alexbradshaw@forsterchase.com).

