

Eric Sturdza Group develops fourth line of business:

Family Office

The Eric Sturdza Group is expanding its independent investment and family office services by merging sector specialist Lagane Family Office SA with Coges Corraterie Gestion SA, an independent wealth manager. The purpose of this merger is to expand the current range of wealth management solutions by including new family office services, with the aim of enhancing the management of clients' needs and expectations.

Coges Corraterie Gestion SA will be equipped to help families structure and preserve their wealth, starting with analysis of their overall asset base and optimisation of their financial position. At all times, it will take into account the interests of each generation as well as their performance requirements.

Family Office will officially become the group's fourth line of business alongside Private Banking, Asset Management and Wealth Management – activities in which it has already made its mark.

The merger will blend the long-standing expertise of Coges Corraterie Gestion SA, a provider of wealth management services since 1984, with the experience of Lagane Family Office SA. The new entity, which will operate under the name of Coges Corraterie Gestion Wealth Management & Family Office, will amalgamate all the necessary resources for meeting clients' requirements and expectations. Coges Corraterie Gestion Wealth Management & Family Office will remain fully independent and continue to offer clients a wide range of custodians. It can also count on the support of renowned experts from the Eric Sturdza Group as well as the group's network of industry-leading asset management partners.

Long-standing family group serving clients and managers for whom only the best is good enough

Eric Sturdza, whose goal since founding the group has been to bring entrepreneurial leaders together, places considerable importance on the independence of his teams, which he sees as vital for the success of any undertaking. Thanks to this ethos, managers at Coges Corraterie Gestion SA have been able to offer core wealth services and new offerings free from outside interference. Meanwhile, the group has provided business support, including a solid infrastructure for handling increasingly complex regulatory requirements.

The Eric Sturdza Group has the family-based perspective and requisite expertise to ensure that clients' specific needs are taken into account by its comprehensive service. According to Eric Sturdza, "this merger is the next instalment in our group's strategic development, through which we will offer tailored, personalised solutions that cover our clients' needs more fully, as my own family can already attest. Through this merger, the Eric Sturdza Group is building up Coges Corraterie Gestion – a company we acquired in 2013 – into a mainstay in Switzerland's independent wealth management sector."

Collective leadership combining talents

The new Executive Committee, comprising Michaela Zanello Sturdza, Stéphane Gibert and Jean-Pierre Lagane, will be in charge of implementing this ambitious project, at the same time maintaining an unwavering commitment to clients.

They will report to the Board of Directors comprising Nicolas Killen (chairman), Raphaël Jaquet, Luca Micheli and Michaela Zanello Sturdza.

- Michaela Zanello Sturdza will work to harness synergies with the rest of the group and contribute her experience and expertise, acquired from managing a family-owned group.
- Jean-Pierre Lagane, a well-connected figure in the industry, will oversee family office services for the entire group.
- Stéphane Gibert will head up and develop wealth management in Switzerland and other markets.

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ABOUT ERIC STURDZA GROUP

The story of Banque Eric Sturdza is the story of an entrepreneur that spans more than four decades. While the bank's origins date as far back as 1762, it was in 1985 that Eric Sturdza began laying the foundations for a *new model for private banking*, as the director of Banque Baring Brothers' Swiss operations.

Over the decades that followed, Eric Sturdza secured significant stakes in the bank, eventually owning it outright, at which point it was renamed Banque Baring Brothers Sturdza SA. Along the way he has given senior managers the opportunity to become equity holders, reinforcing the spirit of entrepreneurship that is woven into the very fabric of the bank.

Under Eric Sturdza's leadership, the bank has grown to *exactly the right size* to maintain a dynamic and enterprising culture. And while the bank has remained deliberately small, its reputation has continued to grow, and with it, opportunities to expand its reach through new ventures. In 2015, the bank became Banque Eric Sturdza SA, in recognition of the group's transformation.

The group is building a European network of financial institutions that has come to encompass Banque Eric Sturdza SA, Banque Pâris Bertrand Sturdza SA, Coges Corraterie Gestion SA (an independent wealth manager), Eric Sturdza Management Company SA and EI Sturdza Strategic Management Ltd (an independent asset manager).

The group has firmly set its sights on innovation as it seeks to adapt to new developments and ever-changing needs among its clients and their families, providing tailored investment services that deliver strong returns. Its investment funds are regularly singled out for their performance. Accolades include the Citywire Group Awards, received between 2010 and 2017, which have ranked EI Sturdza funds in the top quartile for the global sector and in the top 5% for the European sector.

Key figures:

Over CHF 10 billion in assets under management

150 employees

17 investment funds

Offices in Geneva, Luxembourg, London and Guernsey

COGES CORRATERIE GESTION SA

Coges Corraterie Gestion was founded in 1984 to offer independent financial services to HNWIs in Geneva and further afield. More than ever, investors and wealth managers are in search of entities that can support them in managing assets in collaboration with a wide variety of custodians.

Coges Corraterie Gestion, which was acquired by Eric Sturdza Group in 2013, continues to act independently from the group, although the latter provides it with business support. In 2018, Lagane Family Office has merged with Coges Corraterie Gestion to offer dedicated multi-family office solutions.

Coges Corraterie Gestion is governed by the code of conduct of the Swiss Association of Asset Managers, the industry's main self-regulatory body, of which it is a founding member. As a group company, it falls under FINMA anti-money laundering oversight.

LAGANE FAMILY OFFICE SA

Lagane Family Office is a multi-family office, based in Geneva, that brings together in one place all the skills required for successful wealth management. It works fully independently from major service providers to offer personalised solutions and services that create value over the long term.

Lagane Family Office manages wealth efficiently, providing a comprehensive approach with expertise in investment securities and property assets, financing and structuring solutions – in other words, an entire range of services vital for managing family wealth and passing it on to the next generation.

In 2018, Lagane Family Office has become part of Coges Corraterie Gestion, an independent wealth manager within Eric Sturdza Group.