

DEALS

2021 FINANCIAL SERVICES DEAL HIGHLIGHTS

36+ 

TOTAL DEALS

£155M+ 

TOTAL VALUE OF DEALS

12 

HC TEAM MEMBERS INVOLVED

£17m Sale of Wealth Management Firm

Deal team:

Alex Canham, Edward Beedham, Joel Gocool, Michelle Lamberth, Anisha Malik, Kerry Roshier, Daniel York, Darren Smith

Three Acquisitions by Private-Equity Firm

Deal team:

Alex Canham, Melissa Deutrom, Joel Gocool, Edward Beedham, Grace Caudell, Michelle Lamberth, Anisha Malik



"We worked with Alex and Ed in the sale of our financial advice business and we found them extremely helpful in guiding us through the whole process and making what seemed like the complex and difficult, easy to understand. We found them approachable, knowledgeable and good listeners as well as advisers. I would certainly recommend them to any other firm who might be looking to take the same path as we have."



"Alex Canham, Ed Beedham and the team did a tremendous job steering us through the sale of Chadney Bulgin. With so many Partners involved, their comprehensive presentation of the contracts, together with excellent communication throughout (vital in this type of deal), enabled both a fast & efficient sale process. Much appreciated!"

£3.6m Purchase of IFA

Deal team:

Alex Canham, Alistair McArthur, Melissa Deutrom, Joel Gocool, Edward Beedham, Tom Hyatt, Michelle Lamberth, Anisha Malik

£3.5m Reorganisation and Sale of IFA Firm

Deal team:

Alex Canham, Joel Gocool, Hannah King, Michelle Lamberth, Anisha Malik



£24m Sale of Discretionary Fund Manager

Deal team:

Alex Canham, Edward Beedham, Michelle Lamberth, Anisha Malik

£6m Purchase of Fund Management Group

Deal team:

Alex Canham, Alistair McArthur, Daniel York, Melissa Deutrom, Edward Beedham, Michelle Lamberth, Anisha Malik



"A big thank you to Alex and his team in particular Melissa who worked diligently and at all times looked to serve our best interests. They were constantly available to provide reassuring advice through a sometimes difficult transaction and fraught period. Despite the tight deadlines and significant workload I was delighted with their performance."



" Alex and Melissa provided a very professional service whilst also ensuring we negotiated some key inclusions and protection into our business sale agreement. Alex was a real ally ensuring that we negotiated the best possible outcomes and found solutions to areas where one didn't seem to be present. His work alongside Melissa ensured a cohesive delivery of our complex sale – thank you both."

£12m Sale of IFA to National Advisory Firm

Deal team:

Alex Canham, Daniel York, Melissa Deutrom, Edward Beedham, Tom Hyatt, Michelle Lamberth

£1.5m Purchase of Financial Planning Firm

Deal team:

Alex Canham, Melissa Deutrom, Michelle Lamberth, Anisha Malik

£8.4m Sale of IFA to National Advisory Firm

Deal team:

Alex Canham, Melissa Deutrom, Michelle Lamberth, Anisha Malik



"Melissa provided an in-depth professional service ensuring that we were clear on some of the more complex issues surrounding the agreement. She would always works with our timelines despite it being an extremely busy period for her. Its been really great working with Melissa and I would not hesitate in working with or recommending her and her team now or in the future. Thank you so much for all your insight and knowledge during the past few months."

£2m Sale of Private Client Investment Group

Deal team:

Alex Canham, Melissa Deutrom, Joel Gocool, Grace Caudell, Michelle Lamberth, Anisha Malik

£5.75m Sale of Financial Planning Firm

Deal team:

Alex Canham, Melissa Deutrom, Michelle Lamberth, Anisha Malik



Legal 500 rankings: Herrington Carmichael has many recommended lawyers listed at <https://www.legal500.com> Alistair McArthur is a Leading Individual.

