

# FINANCIAL SERVICES

## DEAL HIGHLIGHTS 2022

40+ 

TOTAL DEALS

£210M+ 

TOTAL VALUE OF DEALS

9 

HC TEAM MEMBERS INVOLVED

### £60m sale of shareholder interests in multiple national IFA businesses

Deal team: Alex Canham, Edward Beedham, Michelle Lamberth, Anisha Malik, Chris Gemson.

### £7m sale of family-owned financial planning firm

Deal team: Alex Canham, Joel Gocool.

### £27.5m sale of discretionary fund manager

Deal team: Alex Canham, Melissa Deutrom, Edward Beedham, Michelle Lamberth, Anisha Malik.

### £2.2m sale of business and assets of Scottish financial advisory business

Deal team: Alex Canham, Joel Gocool, Michelle Lamberth.



My experience of working with Melissa, Alex and the team at Herrington Carmichael has been entirely positive. At every stage in our transaction they have been extremely helpful, supportive, diligent and efficient."

I would not hesitate to engage their services again in the future, and would happily recommend them to anyone looking for corporate legal support. Thank you so much Team Herrington Carmichael!"

### £17m sale of discretionary fund management business

Deal team: Alex Canham, Melissa Deutrom, Edward Beedham, Michelle Lamberth.



Legal 500 rankings: Herrington Carmichael has recommended lawyers and Leading Individuals listed at <https://www.legal500.com>



### **£2m acquisition of IFA by private-equity-backed national consolidator**

Deal team: Alex Canham, Melissa Deutrom.

### **£7m sale of regional IFA in exchange for equity**

Deal team: Alex Canham, Melissa Deutrom, Michelle Lamberth.

### **£25m sale of network of financial advising firms**

Deal team: Alex Canham, Edward Beedham, Michelle Lamberth, Anisha Malik.

### **£12m sale of chartered accountancy and tax advisory business**

Deal team: Alex Canham, Joel Gocool, Michelle Lamberth.

### **Sale of financial advisory LLP business for £5.5m in options**

Deal team: Alex Canham, Edward Beedham.



I wouldn't hesitate in recommending Alex, Ed and the rest of the team. We have worked together on several transactions now and I have been very impressed with their professional approach, broad knowledge and guidance. Their support has helped me to successfully balance the legal, regulatory and commercial elements of the deals."



Excellent level of service provided by Alex, Joel and the team. Our sale was not particularly straightforward, quality advice provided in a timely manner. I am not sure we could have completed our sale without them. Would highly recommend!"

### **£12m sale of chartered accountancy and tax advisory business**

Deal team: Alex Canham, Joel Gocool.

### **£3.1m sale of an independent financial advisory company**

Deal team: Alex Canham, Edward Beedham, Anisha Malik.

### **£1.5m sale of a financial advisory business**

Deal team: Alex Canham, Joel Gocool.

### **Sale of an independent financial advisory firm for £5m**

Deal team: Alex Canham, Edward Beedham, Anisha Malik.

### **£1.4m management buyout of a financial planning business**

Deal team: Alex Canham, Melissa Deutrom.

