



# Ogier act in sale of Spearpoint to Brooks Macdonald Group plc

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Ogier in Jersey and Guernsey has advised on the sale of Spearpoint and Spearpoint Retirement Services who are to be acquired by Brooks Macdonald Group plc, an AIM listed integrated wealth management group for approximately £34m.

Spearpoint is a leading independent investment boutique established in 2007 with offices in both Jersey and Guernsey. It operates in four areas of expertise: discretionary fund management, retirement services, advisory fund management and execution only stockbroking. Spearpoint has funds and assets under management of approximately £1.1bn and the new combined group will have discretionary funds under management of approximately £4.5bn. It retains strong links with local and international trust companies.

The core Spearpoint team had worked together for approximately 10 years before forming the business. Spearpoint has 54 staff across Jersey and Guernsey including a well regarded and stable investment management team and high quality back office who have focused on delivering a strong level of client service and on tailoring a personalised service to investment management clients.

The business is led by its Chief Executive Officer, John Davey and a senior management team.

Brooks Macdonald believes Spearpoint is a good synergistic fit with its existing growth strategy, adding important access for it to an expanding international pensions market and providing an immediate enhancement of earnings. Spearpoint will also be able to take advantage of Brooks Macdonald's proven marketing and distribution as well as leveraging off its brand to grow.

The sellers of Spearpoint were advised by Ogier as lead lawyers who fielded a Channel Islands team from their local business unit headed in Jersey by Raulin Amy, Sara Johns and Lisa Floris and supported by Frances Watson and Robert Macredie in Guernsey. Brooks Macdonald were advised by Macfarlanes and Carey Olsen.

Raulin Amy of Ogier commented "It is a pleasure to advise John and the team and be involved in a deal of this significance in the Channel Islands where we have the opportunity to demonstrate our cross jurisdictional abilities through a number of workstreams."

## About Ogier

Ogier is a professional services firm with the knowledge and expertise to handle the most demanding and complex transactions and provide expert, efficient and cost-effective services to all our clients. We regularly win awards for the quality of our client service, our work and our people.

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