



Ogier advises on sale of independent trust company

Deals - 15/06/2020

Ogier has advised the shareholders of Pinnacle Trustees, on the sale of the independent trust company to Affinity Private Wealth. Completion of the transaction has seen the establishment of a combined business with increased market share, diversity, reach and capability.

Group partner Matthew Shaxson lead the Jersey-based Ogier team, which included senior associate Kevin Grové and associate Michael Anderson.

Matthew has extensive experience in acquisitions and disposals in the financial services sector and said: "We are delighted to have advised the shareholders of our longstanding client Pinnacle Trustees on this transformational transaction, and in doing so demonstrated again our expertise in advising on M&As in the financial services sector".

"Ogier's IT infrastructure has also meant we have been able to seamlessly continue providing our full service to clients on complex transactions such as this one, despite the challenging circumstances presented by the COVID-19 pandemic."

Pinnacle was founded in 1992 and has built an impressive network of professional intermediaries and strong connections in the Middle East. Affinity is a full service wealth manager, offering wealth consulting, trust and investment services.

James Wetherall, MD and shareholder at Pinnacle Trustees said: "We are delighted to have completed the acquisition and are very excited for the future of the Affinity Private Wealth Group. We are especially grateful to Ogier who assisted us throughout this process providing clear and pragmatic advice. To have negotiated and completed this transaction whilst working remotely has been a challenge but one that all parties have risen to."

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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