



Ogier advises on acquisition of stake in Advisa Group

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Ogier has advised the Polygon Collective on its acquisition of a large stake in the Advisa wealth management group.

The transaction presented a variety of complexities and required bespoke solutions from the Ogier team. The end result will see Polygon Group Limited acquire a significant stake in the Advisa Group and the downstream combination of Advisa's wealth management business with Vantage's wealth management business to create one of Jersey's largest independent financial planning businesses, trading as Advisa Wealth going forward.

Ogier provided initial structuring advice and assisted with the implementation of the transaction, including the drafting and review of the principal transaction agreements.

The team was led by partner Raulin Amy assisted by senior associate Kevin Grové and associate Robin Burkill. "The staged completion mechanics are bespoke and complex and enabled the team to demonstrate their experience and knowledge in this sector," said Raulin.

Polygon Group Limited, known as the Polygon Collective, is an independent family-owned investment company founded in 1975 in Guernsey. The company has grown significantly since then and now manages a diverse portfolio which focuses predominantly on property, financial services and angel funding. Ogier are happy to have worked with Polygon to successfully complete on this transaction.

Chief Executive Officer of Polygon Collective Paul Wright said: "We are delighted to have worked with Ogier to combine these two wealth management businesses. This merger is in direct response to the growing demand we have seen in this space for trusted and highly experienced financial planners and Advisa, as a long-established, privately owned Jersey firm of independent financial advisers was the perfect fit for us to combine our wealth management businesses to create one of Jersey's largest independent financial planning businesses."

The transaction is one of a number that the Ogier corporate team have worked on in recent months, assisting clients by providing experience and expertise in complex acquisitions and disposals, with a particular focus on the financial services and regulatory sectors in Jersey.

"The team has worked on a number of transactions during the COVID-19 pandemic which have showcased not only the strength of our expertise in this area but their ability to adapt and deliver high quality client service and successful results on a number of demanding transactions over a short period of time," said Raulin.

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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