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## Middle and Near-East Strategic Alliance

MilleniumAssociates AG, the Swiss-based mergers & acquisitions advisory specialists for the global financial services industry, is pleased to announce that it has entered into a Strategic Alliance with FinaVestment Ltd., the UK-based advisory company. This collaboration will enhance the effectiveness of the delivery and competitiveness in the Middle East and globally of both partners in the alliance.

Founded in 2005 by Habib F. Faris, FinaVestment Ltd. provides wealth management, private and investment banking, real estate and advisory services to individuals and institutions on a regional and international scale. FinaVestment and its principals have long-standing relationships in the Middle East in particular. Outside the UK, the company has additional offices in Switzerland and Jordan.

MilleniumAssociates, founded in 2000 by Ray Soudah, is a leading M&A advisory firm offering support on a worldwide basis particularly to financial institutions and wealth management firms who are seeking strategic advice on corporate strategies, mergers and acquisitions, IPO preparation, or other options. MilleniumAssociates' experienced team has participated in numerous transactions in the past few years covering a wide range of segments of the financial services industry across numerous jurisdictions.



## **Note to Editors**

MilleniumAssociates is the only Swiss based independent M&A global advisory firm specialising in Mergers and Acquisitions and strategy consulting for the financial services industry exclusively. MilleniumAssociates' fully dedicated team of specialists are currently involved in numerous active financial services advisory projects with assignments supporting clients with expanding global strategies, as well as those seeking to determine their ideal strategic options including partnerships, alliances and IPO plans. The firm donates at least one percent of annual gross profits to charity.

Selected previous assignments of Millenium Associates include:

- Sale of Anglo Irish Bank (Suisse) SA and of its affiliated Portuguese branch, Anglo Irish Bank - Sucursal em Portugal, to St. Galler Kantonalbank
- Sale on behalf of Banque Bénédict Hentsch of the non-real estate fund administration business of FidFund Management S.A. to CACEIS Investor Services
- Sale, on behalf of The Northern Trust Corporation (USA), of Northern Trust International Fund Administration Services (Isle of Man) Ltd. to IFG Group plc, Ireland
- Acquisition by Crédit Agricole of Bank Sarasin Europe S.A., Luxembourg, a subsidiary of Bank Sarasin & Co Ltd., Switzerland
- Sale on behalf of Banque Cantonale Vaudoise, Switzerland, of its IT subsidiary Unicible SA to IBM Switzerland
- Advice to SAM Group (Sustainable Asset Management), Zurich, on its strategic cooperation with Robeco (Netherlands) and on the related sale of a 64% stake in the company to the new partner
- Sale by Kredietbank Luxembourg of Banca KBL Fumagalli Soldan (Italy) to Spanish bank BANIF, a subsidiary of Santander Group
- Acquisition by Evolution Group (UK) of Williams de Broë (UK), a subsidiary of ING Group (Netherlands)
- Corporate Advisor to Charlemagne Capital (UK) prior to its Initial Public Offering
- Sale on behalf of Dexia-BIL of Dexia Private Banking (UK) to Rathbone Brothers plc (UK)
- Sale of Abacus Financial Services Group Limited, Jersey, to Royal Bank of Canada (RBC)
- Sale of Seydler AG Wertpapierhandelsbank, Frankfurt/Germany, to Close Brothers Group plc, UK
- Sale on behalf of Caixa Holding SA, Crédit Andorra SA and Dexia Banque Internationale à Luxembourg SA of their joint subsidiary, Société Monégasque de Banque Privée, Monaco, to BNP Paribas Private Bank (Switzerland) SA
- Strategic consultant and advisor to Compagnie Bancaire Genève (CBG) which subsequently sold a 67% stake to Société Générale
- Acquisiton of Lloyds Bank SA, the French wealth management business of the British bank Lloyds TSB, by UBS AG
- Acquisition of JO Hambro Investment Management, UK, by Credit Suisse

For further information see under <a href="www.MilleniumAssociates.com">www.MilleniumAssociates.com</a>

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