

Case Study

Internal Succession & Customer Acquisition



HABEL, POHLIG & PARTNER
VERMÖGENSVERWALTUNG

Habel, Pohlig & Partner is a successful, highly profitable wealth management company based in Wiesbaden, Germany, founded in 1996. With over 600 million EUR in assets under management, HP & P has provided private, corporate and institutional clients from throughout Germany with individualized wealth management focused on long-term value growth and preservation. Sustainable investment strategies further drive the company's growing success, which is reflected by their numerous awards.

Background

Founder Matthias Habel decides to withdraw from the operational business and sell his shares. Two leading employees, one of whom has been working for the company since 1991 and is now the managing director, wish to continue the company in the spirit of the founder. But it is not economically feasible for either of them to take over all the shares. HP & P is pursuing a consistent growth strategy, aiming to expand the advisory team and significantly increase AUM, so they are looking for a partner who can support them in all areas.

Partnership with Cinerius

Cinerius acquires about 90 percent of the shares in HP & P. Approximately 10 percent are transferred to the managing directors, so that they also share in the company's growth on the capital side. As minority shareholders, their risk is limited by disposal options with Cinerius. New employees will be recruited, particularly in sales. In the marketing area, the current HP & P endowment fund will be promoted and an initiative to acquire new customers will be launched. Additionally, the company benefits from exchange with other partner companies, especially in ESG/sustainability and compliance. Founder Matthias Habel remains closely connected to the company as Chairman of the Advisory Board, while his daughter Blanca Habel assumes the role of HP & P's Sustainability Officer.

"For us, company sustainability was a top priority. Due to Cinerius' capital resources, the partnership made it easy for us to transfer the company's management to our longstanding employees. This puts us in an excellent position for our growth strategy." – Matthias Habel, Founder and Advisory Board Member of Habel, Pohlig & Partner

For more information about HP & P, visit www.hpp-vermoegensverwaltung.de.



Cinerius
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