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# Walnut Finance

**Activity** Walnut Finance is a Dubai-based consulting firm active in the following areas

-  Private Banking
-  Family Office
-  Assets Management
-  Mergers & Acquisitions
-  Real Estate

**Clientele** Walnut Finance's clientele is a mix of High Net Worth Individuals and Institutions

**Geographical** Our clients come from the Middle East, Africa, Asia, and Europe, they usually have a strong connection to the Middle East, be it a business, a properties, or their residency



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# Private Banking

**Asset Managers** We offer access to, and monitor selected investments vehicles from, Assets Managers

-  WF Assets Management
-  UBS
-  BNP-Paribas (Parvest)
-  Man Investments
-  Superfund
-  FIM
-  Permal Capital
-  Swiss-Asia
-  Société Générale

**Banks** Through long-lasting agreements, we offer our clientele access to first-class banks

-  Crédit Suisse
-  UBS
-  BNP-Paribas (Switzerland)



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# Family Office

**A Growing Concept** The concept of Family Office is quite new in the region, but it is now fast emerging

**Ideally Positioned** With 20 years of presence in the region and a deep knowledge of the market, Walnut Finance partners are ideally positioned to capture a substantial share of this business

**Services** We offer our HNWI clientele state-of-the-art

-  Portfolio monitoring
-  Accounts monitoring
-  Estate Planning
  - ✓ *Personal Holding Companies*
  - ✓ *Trusts*
  - ✓ *Foundations*
-  Real Estate (UAE and France)



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# Assets Management

- Goals Assessment** Assessing goals is an important part of portfolio building; managing investors' risks and rewards expectations is also of the utmost importance
- Proposal** Proposals are worked out and presented to investors
- Implementation** When agreed upon the strategy is implemented, this goes from choosing a banking platform to selecting investments
- Monitoring** Once the strategy is implemented, Walnut Finance will follow it up and propose the necessary corrections when deemed necessary



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# Mergers & Acquisitions

**Businessmen** With a strong clientele base of successful businessmen, Walnut Finance has devised a strategy aiming at introducing their businesses to potential investors either for straight sell out or for injection of capital

**Private Equity Funds** Walnut Finance act as an introducing party for various Private Equity Funds based in the Middle East, Asia, or Europe

**Private Investors** We also introduce new partners to existing businesses to create synergy or increase the capital base

**Role of Walnut Finance** We help businessmen in:

-  Valuing their companies
-  Setting up a business plan
-  Conduct an finalize a transaction



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# Real Estate

**Bouygues Immobilier,  
France**

Walnut Finance has entered into an agreement with France's #1 promoter, Bouygues Immobilier that develops real estate programs throughout France, Spain and part of Germany.

**Damac Properties, UAE**

Damac Properties is the #1 private promoter in the UAE, it has ongoing developments both in Dubai and Abu Dhabi, but also in neighboring Arab countries. Specializes in luxury units and its standards are close to the US-European ones.

**Omniyat Properties, UAE**

Omniyat Properties is a unique developer that offers high-technology developments in Dubai. Apart from its flagship Pad building, Omniyat specializes in office space.

**Contact** [real-estate@walnutfinance.com](mailto:real-estate@walnutfinance.com)



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# The Team

**Olivier Frichou** Managing Partner and co-founder of Walnut Finance. Over 18 years in the Gulf. Over 20 years in the banking industry with Banque Indosuez, Merrill Lynch Int'l, Salomon Smith Barney

*Assets Allocation, Portfolio Management, Mergers & Acquisitions*

**Philippe Rey** Managing Partner and co-founder of Walnut Finance. Over 20 years in the Gulf. Over 20 years in the banking industry with Banque Indosuez, Merrill Lynch Int'l, Salomon Smith Barney

*Assets Management, Offshore Banking, Estate Planning*



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