

FIGTREE FINANCIAL ANNOUNCES LATIN AMERICAN JOINT VENTURE DEAL

Barbados and Trinidad based multi-family office firm, FigTree Financial, has announced joint venture with investment banking and advisory firm, Valoriza Group.

ST MICHAEL, BARBADOS, May 2, 2023 /EINPresswire.com/ -- Barbados and Trinidad based multi-family office firm, FigTree Financial, has announced a joint venture with boutique Latin American investment banking and advisory firm, Valoriza Group.



We have worked with the team at Valoriza for many years and formalising our already excellent relationship via a joint venture is a natural progression for both firms and our respective clients."

*Daniel Farmer, Chairman,
CEO*

The deal will enable FigTree's clients to access the investment banking, corporate advisory, debt structuring and private equity capabilities the Valoriza team excel in providing; plus allow FigTree to expand its network, service offering and client base in Latin America.

Conversely, the JV will allow Valoriza's client base in Colombia and Central Americas to gain access to FigTree's extensive multi-client family office services in wealth

management, estate planning, succession planning, corporate administration, treasury and risk management.

FigTree Financial is operated by five highly experienced directors whom are supported by a dedicated team in Trinidad and Barbados. Daniel Farmer, Chairman and CEO of FigTree, commented on the deal: "FigTree has undergone a period of significant growth and expansion over the past five years and we are continuously working to ensure we have the capability to service our clients' needs, either directly through our own team, or through strategic partnerships with firms that align with FigTree's vision and values.

"Many of our clients are now turning to us for help with their family's operating businesses, meaning that we are often asked to provide specialist advisory support to help them access capital markets in and outside the Caribbean region and assist with corporate valuations and due diligence. We are also seeing a demand for debt sourcing and structuring advice and a wide range of general investment banking related services.

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Luis Carlos Ochoa París, Founder and Managing Partner of Valoriza, added: “Many of our Latin American based clients ask us to assist with the structuring and management of their private wealth and are often keen to obtain these services in a jurisdiction geographically separated from the base of their corporate operations and country of residence. We are fortunate to have had many opportunities to work with Daniel and his team at FigTree in the past and are excited about taking our working relationship to the next level by virtue of this joint venture agreement.”

The JV was completed in April 2023 and teams in both firms are working towards the delivery of their newly enhanced offerings by the end of Q2 2023.

Ends

Notes to editors:

FigTree Financial is multi-family office advisory firm based in Trinidad and Barbados with clients and coverage across the Caribbean and the Americas. It was established in 2016 in Barbados, and opened a second location in Trinidad in 2022. The firm’s mission is to protect, manage and grow clients’ wealth – now and for generations to come. The senior leadership team is made up of seasoned industry experts, whose credentials include senior leadership experience with some of world’s largest financial institutions managing substantial wealth and complex global assets. For more information visit www.figtreegroup.com

Valoriza Group is an investment & merchant bank boutique with coverage across the Latin American region. The firm has advised clients in nine countries across the Americas and its partners have more than fifty years of combined experience via senior roles in global investment banks based in New York as well as large domestic advisory firms and banks throughout Latin America. Valoriza Group has successfully closed more than a hundred transactions, many of which were executed internationally (cross border). The firm offers investment banking advisory services, financial consulting, debt structuring and private equity investments. It currently advises clients with revenues ranging from USD1.0mm up to USD 1 billion. See <https://valorizagroup.com>

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