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# *Independence makes Primonial a solid wealth manager*

**M**any investment decisions are driven by familial goals such as financing a child's education, protecting a spouse, preparing for retirement or simply conveying a heritage, and these patrimonial objectives are at the heart of Primonial's concerns.

Run by some of France's leading wealth management specialists, Primonial understands the motivations of investors. As the first independent wealth management company in France, Primonial creates and selects, with great

freedom and objectivity, the most suitable investment solutions for its clients.

"We are an open institute," says Stéphane Vidal, CEO. "Aside from creating innovative products in-house, we also pick and distribute the best products in the market that will bring added value to our customers."

Learning about a client's objectives is the first step that Primonial takes to guide its more than 40,000 customers to security and financial freedom. Clients preparing for retirement, for instance, are advised to invest in real estate.

For maternity and after-retirement goals, Primonial directs clients to activities linked to health and education including other non-traditional economic markets. Investors who can take a little more risk may be advised to go overseas and invest in places where the profitability levels are higher.

"We build an asset location that is nearest to a client's objectives," Vidal says. "We meet with our customers at least once a year to compare and evaluate their situation so that we can easily assess and adjust investment and risk profiles. Our

clients appreciate this face-to-face relationship."

Collecting more than €3.7 billion (HK\$31.7 billion) in funds last year, and managing assets worth more than €11 billion, the award-winning wealth management company plans to grow organically through partnerships and co-investments.

"We are primed for growth," Vidal says. "We are successful because we know our customers, and we will continue to provide them with exceptional service and the best investment choices."



**Stéphane Vidal, CEO**  
Photo: Philippe Matsas