



A Family Office at your side to preserve and grow your wealth.

Our Mission Statement

- Phoenix Capital is committed to offering its clients a relationship based on mutual trust where the human factor is at the heart of the exchanges.
- Our company was born out of a need for freedom which, thanks to our independence from any financial institution, allows us to offer tailor-made products and services in the sole interest of the client.
- Our ambition is to be considered by our clients as their financial architect to accompany them at every stage of their life.
- Our objective is to make their assets grow by providing them with the global vision, transparency and discretion they are looking for.

Phoenix Capital is licensed by the Belgian Financial Services and Markets Authority (FSMA).

Phoenix Capital accompanies you, step by step, in the growth of your wealth:

- Inventory: this is a complete inventory of your current assets and liabilities, and their distribution. This first step allows us to get to know you better in order to assist you adequately to develop your wealth and implement an action plan.
- Action plan: We support you in setting up solutions to preserve and develop your assets, in accordance with your objectives, constraints and risk sensitivity.
- Follow-up and updates: Over the course of your life, your family, professional and wealth situation may change. This is why we ensure the regular updating of the action plan initially defined.

Our values

Trust

Trust is the cornerstone of our business. We build relationships with families over the very long term, often over several generations. The trust they honour us with is the result of our commitment to them, our integrity, our skills and our independence.

Independence

Our independence allows us to act exclusively in your interests, with integrity and impartiality. The realization of your projects and your satisfaction are our top priority.

Discretion

Absolute respect for the secrets entrusted to us is the sine qua non of the trust placed in us. Discretion is the essence of our profession.

Transparency

The world of investment and wealth management often requires clarification. Part of our mission is to be an educator to make it simple and intelligible.

Our social responsibility

We believe that your assets can have a positive impact on society and the environment. We help you generate such an impact based on your wishes and the investment themes you care about.

By targeting companies that have a positive influence on society and the environment, we have found that this leads to a better financial performance of your investments.

To ensure that your assets contribute to this positive impact:

- we are sensitive to investment funds that rank among the best in terms of sustainability and social and environmental responsibility;
- we work with partners (asset managers, banks, private equity funds, life insurance companies, ...) who share our values and objectives;
- we adhere to the United Nations Principles for Responsible Investment (unpri.org) and the United Nations Sustainable Development Goals (unsgd.un.org).



Sustainable investment

It is an investment strategy aimed at both financial profit and utility to society as a whole. It takes "ESG" criteria into consideration when selecting companies in which to invest: those related to the environment (E), society (S) and governance (G).

The current challenges are numerous:



Environnement ^

reduction of CO2 and greenhouse gas emissions, ocean pollution, water scarcity (« blue gold »), depletion of natural resources, the fight against excessive deforestation, biodiversity and the protection of flora and fauna, etc.



Society ^

human rights, prohibition of child labour, reduction of discrimination between men and women, protection of privacy, consumer protection, health and safety, harassment at work...



Governance ^

fight against corruption and fraud, composition and independence of the board of directors, transparency, whistleblower policy, respect for the rights of minority shareholders, etc.

A study carried out in 2015 by Morgan Stanley and covering 10,000 funds concluded that funds invested according to ESG criteria performed better than funds invested in a less sustainable manner. This therefore calls into question the idea that a choice should be made between positive societal action and a good return.

The founder

Pierre-Emmanuel Laurant founded Phoenix Capital in June 2017 after a professional career as a corporate lawyer (Linklaters) then banker (BNP Paribas Fortis), first in the field of mergers & acquisitions, then as a private banker and wealth manager. He has had a passion for financial markets for more than 20 years. This multidisciplinary experience coupled with a university education (Master in Law at the Catholic University of Louvain, Master of Laws at New York University, Master in Finance at ICHEC, Master in Business Management at Solvay Business School) enables him to grasp all the issues related to wealth advice.

Our network

By being active in the field of finance and wealth management throughout our career, we have built up an extensive network of experts active in this sector: bankers, wealth managers, investment fund managers, life insurance companies, lawyers, notaries, tax advisors, chartered accountants, art experts, private equity and real estate professionals, ... We can thus offer our clients the benefit of this network to accompany them in the best possible way according to their needs or, if they prefer, work in collaboration with their own advisors.

Solutions

We will put in place the most appropriate strategy to preserve and grow your wealth. This daily challenge requires a perfect understanding of your family, your business, your financial risk profile, your objectives and your concerns in order to offer you the most optimal solution.

Financial investments

We support you in your financial investments. We define together the optimal strategy based on your objectives, your investment horizon and your risk sensitivity, while ensuring that investment taxation is optimized. In particular, we offer solutions through life insurance policies of the Branch 23 via our partners, leading Belgian and Luxembourg insurance companies.

The objectives are multiple:

- To grow your capital, either by capitalizing or by occasionally withdrawing income through buy-backs
- Investing in a tax-efficient way
- Passing on to future generations while retaining control over the assets transferred and avoiding inheritance tax by structuring the contract in an appropriate manner
- The life insurance contracts offered can be based on collective internal funds, external funds or dedicated internal funds.

In the case of dedicated internal funds, the premium is invested in a portfolio of assets that is customized for you and managed on a discretionary basis. You will have access to a very wide range of investment opportunities: individual equities and bonds, commodities, exchange-traded funds (ETF's), investment funds (SICAV), alternative investment funds (hedge funds, private equity, real estate funds...).

Wealth structuring

We support you in establishing an overall diagnosis of your assets and income.

We help you establish an action plan that takes into account your objectives, your projects and your investment horizon, choosing the optimal solutions that can best serve your interests.

We assist you with updates to this action plan as changes occur in your life (new projects, change of residence, family changes, etc.).

We support you in structuring and valuing your wealth by assisting you in terms of:

- financial planning
- calculation of current and future revenue streams
- asset allocation
- optimization of the risk/return ratio
- tax optimization

We also assist you in thinking about how to pass on your heritage.

Solutions to minimize the cost of inheritance as much as possible are studied taking into account your family environment, your wishes and the characteristics and location of your assets.

Family Office

Concept

The concept of family office originated in the United States in the 19th century when wealthy families established specific structures on their behalf to control certain aspects of their wealth management and to defend family interests.

Today, many families wish to entrust the supervision of their assets to external family offices. Indeed, as they are often multi-banked, they find themselves faced with a multitude of managers and private bankers who do not have a global view of their wealth situation. They therefore feel the legitimate need to be assisted in an objective and independent manner in relation to all the assets that make up their assets.

This is the service we offer.

Added Value

Why use the services of a Family Office?

Support	Freedom	Tailor-made	Consolidation	Availability	Privacy
We follow your private affairs on a daily basis, accompanying you in the preservation and growth of your wealth and in its transmission, while protecting you from numerous external solicitations.	Being able to relieve you of all or part of the management of your administrative tasks will allow you to gain peace of mind and devote your time to more rewarding activities (family, travel, leisure, sports,...).	Benefit from a complete service that is tailor-made with your family and for your family.	By acquiring a consolidated view of all your assets, you will gain better control and reduce costs and complexity.	Whatever problems may arise concerning the family patrimony, we are always there to assist you in all circumstances and answer your questions.	A dedicated family office ensures the best protection for your privacy and the security of your financial information.

Our tailor-made services

Our services are tailored to your needs and can include, among others:

- supervision and coordination of various service providers involved in the management of your affairs (lawyers, tax specialists, accountants, notaries, real estate agents, etc.)
- dealings with insurers and bankers: monitoring of relations, negotiation of tariffs (transaction fees, custody fees, credit conditions, etc.)
- detailed analysis of the overall family and property situation and the terms and conditions of ownership
- drawing up a consolidated inventory of all your assets (real estate, securities portfolios, private equity, art collections, etc.) at regular intervals, taking into account the sum of assets and liabilities
- search for the best investment opportunities in unlisted assets (real estate & private equity), support in the implementation of the investment (direct or club deal) and monitoring at regular intervals
- assistance on legal, tax and administrative aspects relating to the acquisition, holding and transfer of a collection of works of art

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