

DATE

July 15, 2022

SECTORS

Financial Services

DEAL TYPE

M&A Advisory

DEAL LOCATIONS



DEAL TEAM



Andrew Claymore
Managing Director



Charlie Tuttle
Vice President



Muhammad Moosa
Vice President

DC Advisory advised FPE Capital on its investment in Dynamic Planner



Background

- FPE Capital LLP (FPE) is a UK-based specialist growth private equity investor focussed exclusively on the software, services and data sectors
- Dynamic Planner, headquartered in the UK, is a leading software provider to the wealth management sector
- Through its intuitive and multiple award-winning platforms, Dynamic Planner enables financial planning and advice firms to match people with suitable portfolios through engaging and risk-based financial planning
- Dynamic Planner now serves almost 40% of UK wealth advice firms and over 150 Asset Managers, profiling over GBP 250BN of assets via its Software as a Service (SaaS) platform

Process

- DC Advisory (DC), led by Andy Claymore, was engaged by FPE to provide buy-side M&A advice to support their investment in Dynamic Planner

Outcome

- In July 2022, FPE signed an agreement to invest in Dynamic Planner, backing an experienced management team, led by Ben Goss, to drive the business into its next growth phase
- FPE has a successful track record in backing and scaling high quality SaaS

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businesses, including experience as a previous investor in Defaqto, a recognised software and data provider to the UK wealth management sector

- FPE's investment in Dynamic Planner builds on its success in software focused product businesses with strong positions in attractive end markets
- The financial terms of the deal were not disclosed
- This transaction reinforces DC's strong credentials in the wealth management and wealth-tech sectors – having recently advised Ludlow Wealth Management on its sale to Mattioli Woods plc, Isio Group on its acquisition of Premier Pensions Management, and Fidelius on a new M&A facility with Natwest

'Dynamic Planner is an exceptional business which occupies a key position as a leading SaaS player in the rapidly growing wealth management sector. We greatly valued DC Advisory's support on this landmark transaction for us, in particular their highly relevant commercial acumen and deep sector relationships.'

Dan Walker
Partner at FPE Capital

'DC Advisory is delighted to have supported FPE Capital on this transaction, a perfect partner for Dynamic Planner as they look to accelerate their exciting UK and European growth plans.'

Andy Claymore
Managing Director at DC Advisory