# Press release

Paris, 19 November 2020

# Leading wealth management and finance software provider HARVEST and asset information expert FIDROIT join forces.

#fintech #wealthmanagement #frenchtech #harvest #fidroit #financialadvisory #assetmanagement

**A growth-oriented project with two major aims: to consolidate a service-based approach and meet technological challenges.**

HARVEST and FIDROIT, two experts in wealth management, have announced their intention to unite their companies under the umbrella of the holding company Winnipeg Participations, subject to the abandonment of a takeover bid by Fidroit employees. Two months after the founders of HARVEST handed over to the new CEO, Virginie FAUVEL, this union will be a major step towards the creation of a group devoted to wealth management professionals.

For HARVEST and FIDROIT, the aim will be to “bring together the best of both worlds” – digital and human, tools and services, investment and wealth planning, advisory services and transactions – in order to support all wealth management players at every stage of the financial advisory process. These complementary skill sets will allow for many synergies and an industrial strategy capable of meeting the transformation challenges the sector faces.

**Virginie FAUVEL**, CEO of Winnipeg Participations and CEO of HARVEST, said: “Harvest and Fidroit are joining forces through the Winnipeg group to serve our clients across an even wider range of wealth management activities. This bringing together of multiple talents seems to me to be the best way of making our group a leading player in France”.

**Olivier ROZENFELD**, CEO of FIDROIT and future Deputy CEO of the group, said: “This alliance will be a very important step, not only for the companies involved, but also, above all, for wealth management professionals. It is a way of continuing to actively support them with the profound changes happening on our market and to make them strong players through, among other things, our service-based ethos.”

**About HARVEST**

Founded over 30 years ago, HARVEST is a pioneering fintech specialising in the wealth management and finance sectors. The company designs digital solutions for all players in the financial advisory process (producers, distributors, intermediaries and end clients). Its credo? To release the full potential of wealth management professionals: banks, insurance companies, financial advisers, management companies, family offices, accountants, tax lawyers and solicitors. To free up time for advisory activities through digital transformation, to take account of compliance and ever-changing tax and legal requirements to make the work of its 4,000 client firms easier, and to boost commercial efficiency by developing close customer relations and self-care. Those are the challenges our team of industry specialists and technology experts aim to tackle. We have nearly 300 employees, including more than 170 developers and over 60 fiscal and legal experts. They are proud of their company, which has been deemed a Great Place To Work. In 2020, HARVEST recruited 45 staff in France to support its growth, and it now generates annual revenue of more than €30 million.

The little start-up has now become a thriving mid-size firm. HARVEST has been able to maintain all its agility and innovativeness while taking its size and structure to the next level. In so doing, it is contributing to France’s economic development.

 Find out more at [www.harvest.fr](http://www.harvest.fr/)

**About FIDROIT**

For 25 years, FIDROIT’s team of 45 specialists have been deciphering, organising and making accessible the information required to make informed financial decisions. FIDROIT enables professionals to organise and manage their clients’ assets wisely and ethically, relying on strong values such as integrity, rigour and benevolence. It has positioned itself as the ally of choice for wealth management professionals seeking to develop high-value-added advisory services. Through its actions and its creativity, FIDROIT enables these clients to go beyond their traditional tasks of selling products, drafting legal documents and certifying accounts and to offer services that better meet their customers’ expectations.

It provides its 1400 clients with an online wealth management resource (Fidnet), the expertise of its consultants, webinars, face-to-face training, and communication tools. In June 2018, FIDROIT launched the *Communauté du Conseil en Organisation Patrimoniale* (Wealth Planning Advisory Community), a platform where private individuals can easily find member professionals committed to offering financial advice before they sell any product. Today, FIDROIT generates annual revenues of €6 million.

Find out more at [www.fidroit.fr](http://www.fidroit.fr/)

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