

PERSPECTIVE

CREATING WEALTH



Lloyds TSB | Corporate Markets

mosaic private equity

INVESTMENT INTO PERSPECTIVE FINANCIAL GROUP LIMITED FOLLOWED BY THE ACQUISITION OF PERSPECTIVE FINANCIAL MANAGEMENT LIMITED & CAMBRIDGE INVESTMENTS LIMITED

Funds advanced: ~ £11m

Client: Perspective Financial Group /Mosaic Private Equity/Lloyds TSB Corporate Markets

Perspective Financial Group Limited, a consolidation vehicle within the financial services industry, received a c£11m funding package from Mosaic Private Equity and Lloyds TSB Corporate Markets, following which it completed the acquisitions of Perspective Financial Management Limited and Cambridge Investments Limited.

Langtons acted for Perspective Financial Group, Mosaic Private Equity and Lloyds TSB Corporate Markets, undertaking Financial Due Diligence on the target companies in respect of the acquisitions, and providing tax structuring advice in relation to the new group structure.

Perspective Managing Director Damian Keeling said: "These acquisitions represent the commencement of our strategy to create one of the strongest IFA groups in the UK."



Langtons

Corporate Finance