Proskauer Advises Independent Wealth Planners on Acquisition by Titan Wealth

December 18, 2024

LONDON, December 18, 2024 – Proskauer, a leading international law firm, today announced it has advised Independent Wealth Planners (IWP), a leading provider of financial planning solutions across the UK, on its acquisition by Titan Wealth.

The transaction encompasses IWP's two trading entities (IWP Financial Planning Limited and IWP Investment Management Limited).

For IWP, it crystallises the substantial work by IWP's management team in restructuring the group, bringing all trading businesses into two legal entities and onto one operating platform with an enhanced and fully harmonised client experience.

IWP will work closely with Titan Wealth's other financial advisory businesses, including Titan Wealth Planning. It marks the next chapter in IWP's growth, providing unparalleled access to Titan's broad investment solutions and wider network of financial expertise.

The transaction is subject to regulatory approval.

The Proskauer team advising IWP was led by partner Andrew Wingfield and included partner Liam Arthur, associates Eleanor Craven and Nicholas Wardle and trainee solicitor Jack Gregory (M&A); partner Stephen Pevsner and associate Emma McDonnell (Tax); partner Vikki McKay (Real Estate); partner Elisabeth Baltay (Restructuring); special counsel Kelly McMullon (Data Privacy); special counsel Nicola Bartholomew (International Labor & Employment); partner John Verwey and special regulatory counsel Amar Unadkat (Regulatory); partner Barry Newman and associates Antonia George and Shameelah Khan (Private Equity Finance); and partner Mary Wilks (Antitrust).

About Proskauer

The world’s leading organizations and global players choose Proskauer to represent them when they need it the most. With 800+ lawyers in key financial centers around the world, we are known for our pragmatic and commercial approach. Proskauer is the place to turn when a matter is complex, innovative and game-changing. We work seamlessly across practices, industries and jurisdictions with asset managers, private equity and venture capital firms, Fortune 500 and FTSE companies, major sports leagues, entertainment industry legends and other industry-redefining companies.

Our premier M&A practice is distinguished by the combination of our transactional strength and deep sector knowledge. We are a destination firm for large-cap and middle-market deals with extensive expertise in the structural, cultural and procedural issues that are often at the center of complex, cross-border transactions. From London to New York, Paris to Los Angeles and across the globe, organizations turn to our lawyers for their most significant and transformative transactions. Our multi-disciplinary team offers actionable insights, sophisticated strategies and creative solutions that drive commercial success for our clients.

Related Professionals

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  Partner
- **Liam Arthur**
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- **Vikki McKay**
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- **Elisabeth I. Baltay**
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- **Nicola J. Bartholomew**
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