

Ceresio Investors acquires Lagom Family Advisors, enhancing its wealth services range

Lugano, 10 October 2024 | Ceresio Investors - the Swiss Group owned by the Foglia family that has been active for over 100 years in the international financial world, has concluded the acquisition of Lagom Family Advisors SA, through its parent company Banca del Ceresio SA.

Lagom Family Advisors, founded in 2017 and operating in Ticino is a multi-family office specialised in asset consolidation, financial analysis and wealth advisory services for a restricted number of families. It guarantees a highly personalised and totally independent approach.

The acquisition plays a strategic role in Ceresio Investors' journey, contributing to consolidate, thanks to the professionalism and experience of the Lagom Family Advisors team, its positioning as a financial boutique capable of supporting clients with high value advisory services. This includes the management, structuring and consolidation of articulated assets, as well as corporate advisory and investment banking for family businesses, both in Italy and Switzerland.

"I am delighted to see that families, who have particularly appreciated Lagom's independence of judgement over the years, have found in Ceresio Investors the same values and an environment that is naturally organised to follow their multiple needs," said **Gabriele Corte**, Executive Board Member of Ceresio Investors and General Manager of Banca del Ceresio.

"We are excited and honoured to join forces with Ceresio Investors. We are confident that this partnership will not only strengthen our ability to guarantee high quality services, personalisation and attention to the families who trust us, but that it will significantly elevate our solutions, capabilities and technical and professional skills," said **Severino Pugliesi**, co-founder of Lagom, who will retain the position of CEO.

In the transaction, Banca del Ceresio used the legal and tax advice of Fiduciaria Mega SA, with partners Stefano Grisanti and Alessandra Balerna; Lagom Family Advisors SA used the legal advice of Studio Legale Lucheschi Mascheroni.

Ceresio Investors represents the Swiss banking group headed by Banca del Ceresio-specializing in wealth management, securities custody, corporate and investment banking, and tax and asset consolidation-founded in 1919 in Milan by Antonio Foglia. The third generation of the Foglia family is active today in Lugano through the parent company Banca del Ceresio; in Milan through Ceresio SIM, Global Selection SGR and Eurofinleading Fiduciaria; and in London with Belgrave Capital Management. Capital strength (simplified Leverage ratio 38.9%), reputation in management (CHF 8.4 billion in assets under management) and the logic of co-investment between ownership and clients have always been its main distinguishing features (www.ceresioinvestors.com).

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