



# WISE INVESTMENT

PLANNING FOR LIFE

## Press Release

The Oak Investment Partnership has taken the decision to demerge. A new structure comes into effect in July and will allow for greater simplicity and long-term alignment for the partner companies and their underlying operating structures and business models.

The Oak Partnership sits above three operating subsidiaries, or partner companies, 'Wise Investment Ltd', 'Wise Funds Ltd', and 'Evenlode Investment Management Ltd'. As a result of the re-alignment, the three partners will operate as three distinct independent and employee-owned companies.

All companies maintain strong balance sheets, giving them the financial strength to withstand short-term stock market volatility and focus on long-term plans with confidence. The partnership will remain in place until the demerger is realised.

**Commenting on the demerger, Hugh Yarrow, CEO of Evenlode Investment, said:** "The Oak Partnership has successfully evolved to a point where a demerger makes better sense for each individual partner and their next chapter of growth. For Evenlode, our long-term investment approach remains the same, but with a simpler operating structure and a clearer alignment between our long-term goals and Evenlode as a distinct operating company.

"The partner companies will all remain employee-owned and will continue to share a tremendous amount of mutual goodwill and a shared philosophy of delivering excellent investment services to our clients over the very long term. All three companies will continue to operate from our existing offices in West Oxfordshire"

**Vincent Ropers, CEO of Wise Funds, said:** "The demerger is a logical step given our companies' respective growth ambitions. We will keep a shared history and maintain close ties, but the restructuring will allow us to grow at our own pace and pursue opportunities independently.

"Wise Funds will be autonomously managed following the demerger. This will create a clearer, more streamlined platform for the next stage of our growth. We are very well capitalised; and look forward to building on our strong track record and continuing to provide attractive returns for our clients."

**Alexandra Rae, CEO of Wise Investment, added:** "Wise Investment has provided financial planning and investment advice to its clients for nearly 30 years. Our business has been built on robust foundations and our strong financial position will continue following the demerger process.

"We look forward to continuing to provide the same quality of service to our clients over the long term. We will also continue to be an independent, employee-owned business. This structure has become an integral part of our DNA and business culture. We retain a strong shared history with both Evenlode and Wise Funds, and will, no doubt, continue to be supportive of each other going forward."



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