

## **Seven2 Agrees to Acquire HRK LUNIS, a Leading German Independent Wealth Management Platform, from J.C. Flowers**

Munich, March 28, 2025 – Seven2, a leading European private equity firm, announced today the signing of a binding agreement with J.C. Flowers & Co., a private investment firm dedicated to investing in the financial services industry, to acquire a majority stake in HRK LUNIS, a prominent German independent wealth management platform. This acquisition marks Seven2's first investment in Germany and a strategic step in its European expansion. The transaction, which remains subject to applicable regulatory approvals, is expected to close in Q4 2025. Terms of the transaction were not disclosed.

The HRK LUNIS management team will continue to lead the company going forward, including HRK LUNIS CEO and co-founder Andreas Brandt who will also retain a significant ownership stake as part of the transaction.

### **HRK LUNIS: A German market leader in independent wealth management**

Andreas Brandt and J.C. Flowers built HRK LUNIS with the vision to provide clients across Germany with an independent, comprehensive wealth management offering featuring innovative products and superior service.

The company offers a broad set of competitive wealth management services, including discretionary wealth management, advisory, investment management, private equity, and family office services (through its Wertiq brand). It serves its clients through a fully integrated platform with one central investment office and a common IT setup.

During the partnership with J.C. Flowers, HRK LUNIS strengthened its positioning as a leading independent wealth manager through a transformational merger between LUNIS and Hubert, Reuss & Kollegen in 2023. It subsequently acquired ProVidens in 2024.

Today, HRK LUNIS is among the top five largest German independent wealth managers with over 100 employees managing more than €6.6bn AuM/AuA for more than 2,200 clients, and operating offices across eight cities.

### **Next chapter in a successful growth story**

Together with Seven2, HRK LUNIS aims at continuing its successful organic growth trajectory by further expanding its footprint, evolving its product offering, including within alternative asset classes, and optimizing its digital capabilities to drive maximum customer benefits.

Building on its successful track record, HRK LUNIS will also continue to pursue an active acquisition strategy. HRK LUNIS offers its future partners and their customers a highly attractive proposition, including

a market leading investment office, full support on regulatory and compliance related topics and strong IT capabilities.

“We want to thank J.C. Flowers for the great partnership over the past eight years, and we are happy to welcome Seven2 as our future partner to further drive organic and inorganic growth, and strengthen the positioning within the German independent wealth manager market as well as across the broader DACH region. The Seven2 team brings valuable sector expertise as well as M&A expertise to support our future growth ambitions,” said Andreas Brandt.

“HRK LUNIS is a terrific business and its development over the past years has established new standards of entrepreneurship and professionalism on the German independent wealth manager market. We want to thank Andreas and his team for their sustained efforts in creating this exceptional growth story with us. We are encouraged by the opportunities in the DACH region and we strongly believe that the path forward for HRK LUNIS will be one of further successes alongside Seven2,” said Dr. Ilinca Rosetti, Operating Partner at J.C. Flowers.

“We are thrilled to welcome HRK LUNIS into the Seven2 family. This partnership reflects our deep confidence in this outstanding team, whose expertise and entrepreneurial culture have built a unique business in the German independent wealth segment. We look forward to collaborating with HRK LUNIS to further develop its market leading position and expand its impact in the DACH market,” said Dr. Florian Wolff, Partner at Seven2, and Head of DACH Region.

Rothschild & Co is serving as M&A advisor, Latham & Watkins is serving as legal advisor and Alvarez & Marsal as financial advisor to Seven2. Houlihan Lokey is serving as M&A advisor and Noerr as legal advisor to JC Flowers.

#### **About HRK LUNIS**

HRK LUNIS is a leading independent wealth management platform in Germany. The company offers a broad set of competitive wealth management services, including discretionary wealth management, advisory, investment management, private equity, and family office services. Today, HRK LUNIS operates across eight cities in Germany and manages over €6.6 billion in assets for more than 2,200 clients.

[www.hrklunis.de](http://www.hrklunis.de)

#### **About J.C. Flowers**

J.C. Flowers is a leading private investment firm dedicated to investing globally in the financial services industry. Founded in 1998, the firm has invested more than \$18 billion of capital, including co-investment, in 67 portfolio companies in 18 countries across a range of industry subsectors including banking, insurance and reinsurance, specialty finance, business and insurance services, wealth management and capital markets, payments and software. With approximately \$5 billion of assets under management, J.C. Flowers has offices in New York, London and Palm Beach. For more information, please visit [www.jcfco.com](http://www.jcfco.com).

**About Seven2**

Seven2 is an independent European private equity firm that was founded in 1972 and is fully owned by its partners. The firm is dedicated to investing in high-potential SME and midcap businesses across two main sectors of specialization: Tech & Telecom and Services. Seven2 works alongside entrepreneurs to provide them with the expertise, support, and financial backing they need to achieve long-lasting sustainable growth. Seven2 has offices in Paris, Milan, Munich, and Amsterdam. Follow us: [www.seven2.eu](http://www.seven2.eu).

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