COMMUNIQUÉ DE PRESSE
Deals

RSM carried out the financial vendor due diligence for Neowise during the entry of Groupe Orion into its capital

- RSM, the world's 6th largest audit, accounting, and consulting network, conducted the financial vendor due diligence for Neowise, a French multi-family office dedicated to an ultra-HNWI private clientele, during the entry of Groupe Orion, a national player in wealth management consolidation, into its capital.
- Neowise was advised by an RSM team under the supervision of Eric Fougedoire.
- Through this transaction, RSM's Corporate Finance division demonstrates its ability to support French companies in strategic merger and acquisition operations.

Paris, Octobre 15, 2025
Official press release from Groupe Orion

Groupe Orion announces its entry into the capital of Neowise, a next-generation multi-family office.

Following its investment in this fast-growing Lyon-based firm, Groupe Orion strengthens its offering with a team dedicated to Ultra-HNWI clients.

Groupe Orion, a leading national player in the consolidation of the wealth management sector founded in Quimper, announces its acquisition of a stake in Neowise, a company established in Lyon in 2021 by five experts in private banking and wealth management, all formerly from HSBC Private Bank.

This next-generation multi-family office develops services tailored to an Ultra-HNWI private clientele, composed of entrepreneurs and large families. Neowise's expertise relies on the strong personalization of exclusive services, built on clear and sustainable strategies and a rigorous selection of market investment solutions in the best interests of its clients.

Since its creation, Neowise has experienced exceptionally strong growth thanks to the recognized expertise of its wealth management team. To date, the company manages €850 million in directly advised financial assets, reflecting its clients' trust and the relevance of its approach.

As a multi-family office platform, Neowise took a new step in March 2025, welcoming in Paris a sixth partner, a former executive of a private wealth management bank.

This partnership is part of an industrial and entrepreneurial collaboration between Groupe Orion and Neowise's partners. It brings together two entities sharing the same values: service excellence, relationship quality, and a long-term growth ambition.

Neowise will continue to provide premium advisory services to its clients and maintain operational autonomy through its team of partners, while benefiting from Orion's range of services, the Group's technological infrastructure, and the support of its shareholder Ardian.

With the integration of Neowise, a multi-family office platform dedicated to Ultra-HNWI clients, Groupe Orion strengthens its service offering for its clients and positions itself as a leading player across the entire wealth management spectrum.

Maxime Visseaux, Président of Neowise Lyon, explains :

"From the outset, Neowise's goal has been to return to the fundamentals of what wealth management should be. We are delighted with this transaction with Groupe Orion, which shares our values of responsiveness and quality. Its service platform and infrastructure will accelerate our growth."

Emmanuel Angelier et Manuel Parent, President et Vice-President of Groupe Orion add:

"We were impressed by Neowise's remarkable trajectory and found in this company the same rigor and passion that have characterized Groupe Orion since its creation. This new acquisition allows us to target a particularly demanding clientele, for whom our client-first approach and ambition for excellence are key assets."

The RSM team :

- Financial due diligence: Eric Fougedoire, Charles Tiran

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About RSM
RSM is the world’s 6th largest network for audit, accounting, and consulting services, operating in 120 countries. The network brings together more than 64,000 professionals and partners. In France, RSM is a leading multidisciplinary firm serving the executives of SMEs, mid-sized companies, and large corporations. The network has 100 partners and 1,700 professionals across the country, with offices located in the main regional economic hubs, including 19 locations in Paris/Île-de-France, Rhône-Alpes, Occitanie, Western France (Brittany and Pays de la Loire), the Grand Est, Provence-Alpes-Côte d’Azur, and the French overseas territories. RSM continues to grow with the ambition of creating meaningful and lasting value by embodying its mission: “Helping people and organizations grow while serving the collective interest.” Learn more at www.rsmfrance.com

RSM – Corporate Finance
RSM is the 6th largest global audit and consulting network dedicated to the mid-cap segment. The Transaction Advisory Services division includes more than 1,000 professionals across 120 countries. In France, it brings together 6 partners and 45 professionals based in five key economic centers: Paris, Lyon, Nantes, Strasbourg, and Montpellier.The team supports companies and their leaders, investment funds, as well as investors and shareholders, both in France and internationally, in all their financial challenges: transactions, valuation, modeling, and restructuring.Leveraging the strength of its international network, RSM specializes in supporting cross-border operations, assisting both foreign clients in France and French clients abroad.