



**Eric Mounier**  
*Avignon Capital*

*Outstanding in field*

FIRM SIZE *Boutique*

FOCUS *Dynamic investment opportunities*

**An entrepreneur and** CEO with 28 years' investment experience, Eric Mounier has good reason to be happy: 'This has been the best year yet for Avignon Capital,' he says. 'We have been able to achieve fantastic returns for our investors.' He highlights the sale of Avignon assets in Barcelona and Copenhagen as solid indicators, particularly 'identifying and acquiring at the right time, then by implementing a successful value add strategy we can maximise the value at disposal, which delivers attractive returns.' He's particularly proud of the 154 per cent return — a firm record — achieved on equity post-sale of its Copenhagen portfolio. He's equally quick identifying recent trends to whet the appetite of any hungry investor: 'We are still seeing value in the German market and believe there is still room to grow. The Baltic States are emerging countries and we see opportunistic value there,' he says, singling out growth on the Berlin tech scene and current value in end-to-end logistics, from large fulfilment centres to third-party delivery. Mounier co-founded Appleton Asset Management in South Africa in 1992, which he successfully listed in 1999. He spent 15 years focused on commercial property across Europe, launching a commercial property firm by syndication in 2002: the starting platforms for the Cubic Property Fund (which mandates Avignon) and Avignon Capital itself, in 2011.



**Patrick Flaton**  
*Avignon Capital*

*Outstanding in field*

FIRM SIZE *Boutique*

FOCUS *Dynamic investment opportunities*

**An investment expert** with 20 years' experience, Avignon Capital's chief financial and operating officer Patrick Flaton enjoys a 'strong' focus on strategy — 'but with the power to execute this from an operational level.' Responsible for performance at the boutique real estate investment and advisory firm, he specialises in fund and deal structuring — not to mention building company value and 'operational excellence'. He touts its 'enormous execution power against high quality and low costs', concrete emphasis on value-added deals, and long-term eye for high-yield properties: an approach that's paying off: Avignon concluded the financial year with record acquisitions and disposal volumes, totalling €565 million over 25 deals. It entered the hotel real estate market in 2017 via Berlin (it recently opened an office there), Frankfurt and Amsterdam, where Flaton led Avignon's entry into the Dutch market with three acquisitions. The firm is set to launch a listed investment fund in 2018 'to open its doors to long-term institutional investors, with a focus on European commercial real estate'. Clients particularly admire its tailored approach to individual needs: 'the key to the fantastic returns,' Flaton maintains. 'Whether it's investing in sustainable buildings or particular sectors such as hotels and offices, we always customise our strategy to suit their requirements.'

**Nandu Patel**  
*Rothschild Wealth Management*

*Distinguished individual*

FIRM SIZE *International*

FOCUS *Charities*

**Nandu Patel** is known for his charities work — making him very well placed at Rothschild Wealth Management, which boasts 80 charity clients. 'Most of our charities are trying to achieve inflation plus three to four per cent per annum returns,' he says. His charity clients are increasingly engaged on the subject of socially responsible and impact investing. 'Charities' investment managers need to be even more active on ESG matters, as well as documenting their voting decisions,' says Patel. The Liverpool FC fan relishes being part of a family-owned firm: 'Our 200-year heritage and family-controlled ownership enables us to take a long-term view,' he says.

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**In the short term Brexit is an obvious source of near-term uncertainty and complexity for our clients**

James Morrell  
Rothschild Wealth  
Management

**James Peterson**  
*Rothschild Wealth Management*

*Best of breed*

FIRM SIZE *International*

FOCUS *Private client*

**When not working** hard as a director of Rothschild Wealth Management, James Peterson is a keen sportsman and acting Chair of the Eastside Educational Trust. Off the field, he remains a team player in Rothschild's £8 billion AuM UK private client business. Passionate about bringing clients together and building enduring relationships, expanding the network of contacts he can introduce to clients is a key driver behind working with global advisory colleagues. Experience gained in a variety of roles across the private client and family office industry enables him to offer a comprehensive service, as well as explaining investments in his reassuring manner with less experienced clients.

**Will Proger**  
*Saranac Partners*

*Distinguished individual*

FIRM SIZE *Boutique*

FOCUS *Private family office*

**Whatever happened** to all those Barclays executives of the Bob Diamond era? The answer is that several of them went on to set up Saranac. Will Proger joined up with the old gang again following a brief stint at Mirabaud. 'It's by far the highest-quality team I've worked with in the 18 years I've been doing this job,' he tells *Spear's*. Saranac embraces technology, aiming for a 'nimble' operation by ditching 'central legacy systems that date back to the Eighties and the Nineties'. 'There's a freshness to it, which means that it feels different immediately from the get-go,' says the engaging Proger. Such upgrades are, he adds, what tech-savvy clients are hungry for these days.