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Indosuez Wealth Management announces the acquisition of Wealth Dynamix and appoints Romain Jérôme as Chief Executive Officer

Indosuez Wealth Management, the wealth management subsidiary of the Crédit Agricole Group, announces the acquisition of the entire share capital of Wealth Dynamix, a *WealthTech* company founded in 2012 that specialises in client lifecycle management solutions for private banks, wealth management, and asset management players around the world.

This transaction follows the acquisition of a 70% majority stake announced in 2023 and marks a new stage in the merger between the two companies. It is accompanied by the appointment of Romain Jérôme as Chief Executive Officer of Wealth Dynamix, effective 1 November 2025.

This allows Indosuez to strengthen its innovation momentum and leverage the agility of this *WealthTech* to deliver personalisation, digitalisation, and autonomy to its clients in a demanding regulatory environment. This acquisition expands Indosuez's B2B offering to firms within the financial sector, drawing on new digital and technological capabilities for its institutional clients.

Headquartered in the United Kingdom and operating globally through offices in France, Switzerland, and Lithuania Wealth Dynamix employs over 150 professionals and is a leading provider of solutions specifically designed for the wealth management sector in the areas of client onboarding, client lifecycle management (CLM) and customer relationship management (CRM). These solutions enable financial institutions to effectively manage their client relationships, streamline their onboarding processes and offer highly personalised advisory services. Wealth Dynamix supports a wide range of businesses, from investment managers with 10 employees to multi-family offices, international wealth managers, and private banks. The company has been recognised as one of the *WealthTech100* for the second consecutive year, confirming its position among the most innovative technology providers in the global wealth management industry. It has recently signed several major partnerships with European financial institutions and is rolling out its platform to major players in the industry.

As part of this strategic evolution, Wealth Dynamix will retain its autonomous governance structure in order to preserve its culture of innovation and rapid product development, while benefiting from the strength and resources of a global financial institution to accelerate its investments in R&D, artificial intelligence, and security.

Romain Jérôme, previously Chief Digital Officer at Indosuez, has been appointed Chief Executive Officer of Wealth Dynamix.

Romain Jérôme began his career at BNP Paribas CIB before joining Crédit Agricole CIB, where he held several senior positions in digital transformation and innovation. In 2019, he joined Indosuez Wealth Management as Chief Digital Officer to lead the group's digital strategy and support its transformation. In his new role, he will be based in London.

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About Indosuez Wealth Management

Indosuez Wealth Management is the wealth management subsidiary of the Crédit Agricole Group, the world's 10th largest bank by balance sheet (The Banker 2025).

For more than 150 years, Indosuez Wealth Management has been supporting major private clients, families, entrepreneurs and professional investors in the management of their private and professional assets. The Bank offers a tailor-made approach that enables each of its clients to preserve and grow their wealth in line with their aspirations. Its teams offer a continuum of services and offerings integrating advice, financing, investment solutions, fund servicing, technology and banking solutions.

Indosuez Wealth Management has more than 4,300 employees in 15 territories around the world: in Europe (Germany, Belgium, Spain, France, Italy, Luxembourg, the Netherlands, Portugal, Monaco and Switzerland), in Asia-Pacific (Hong Kong SAR, New Caledonia and Singapore), and in the Middle East (Abu Dhabi, Dubai).

With €215 billion in client assets at the end of December 2024, Indosuez Wealth Management is one of Europe's leading wealth management firms.

About Wealth Dynamix

Founded in 2012, Wealth Dynamix solves the key challenges of client lifecycle management (CLM) with intelligent technology. Its award-winning CLM platforms eliminate friction and inefficiencies throughout the client lifecycle, ensure compliance and digitise client journeys. Wealth Dynamix enables wealth management and private banking organisations to deliver a proactive, efficient and engaging customer experience while reducing administrative burdens. Wealth Dynamix is part of Indosuez Wealth Management, the global wealth management brand of Crédit Agricole Group, the world's 10th largest bank (The Banker, 2025).