

Contact

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POELLATH advises Advent International as Special German Regulatory Counsel in investment in Fisher Investments

Private equity firm Advent International successfully participated in a minority investment in Fisher Investments, valuing Fisher Investments at USD 12.75 billion. The total investment amounts to USD 3 billion. As a result of the transaction, Advent International becomes, among others, an indirect minority investor in the German investment firm Grüner Fisher Investments GmbH. The transaction closed in January 2025.

US law firm Ropes & Gray LLP acted as lead counsel to Advent International on this transaction. POELLATH acted as Special German Regulatory Counsel to Advent International and Ropes & Gray.

Fisher Investments is an international fee-only investment adviser serving private clients, small- to mid-sized businesses and institutional investors globally. With USD 299 billion assets under management (as of December 2024), Fisher Investments manages assets across four principal business units: US Private Client, Institutional, Private Client International, and 401(k) Solutions. Together, these groups serve a diverse global client base including corporations, public and multi-employer pension funds, foundations and endowments, insurance companies, health-care organizations, governments and high net worth families.

Advent International is a leading global private equity firm investing in well-positioned companies with operational and strategic improvement potential within five core industry sectors: Business & Financial Services, Healthcare, Industrial, Retail, Consumer & Leisure as well as Technology. Founded in 1984, Advent International has invested in 420 private equity investments across 43 countries, had USD 88,8 billion in assets under management (as of June 2024).

As Special German Regulatory Counsel POELLATH provided regulatory advice (in particular regarding holder control notification pursuant to German Investment Firm Act - WpIG) to Advent International on its investment in Fisher Investments with the following Berlin-based team:

- [Tarek Mardini, LL.M. \(UConn\)](#) (partner, lead, private funds / regulatory)
- [Dr. Enzo Biagi](#) (associate, private funds / regulatory)
- [Lilly Paykert, LL.M.](#) (associate, private funds / regulatory)
- Antonia Becker (research assistant/paralegal, private funds / regulatory)

About us

POELLATH is a market-leading international business and tax law firm with more than 180 lawyers and tax advisors in Germany. We stand for high-end advice on transactions and asset management. We offer legal and tax advice from one source. In our selected and highly specialized practice groups, we not only know the law, but shape the best practice in the market together with our clients. National and international rankings regularly list our professionals as leading experts in their fields.

We offer comprehensive service in the following areas: Mergers & Acquisitions | Private Equity | Venture Capital | Private Funds | Real Estate | Corporate and Capital Markets | Finance | Tax | Private Clients | Foundations and Non-Profit Organizations | IP/IT, Distribution and Antitrust Law | Employment Law | Litigation and Arbitration.