



patrimonia



**September 30 and October 1, 2026
at the Lyon Convention Center**



Patrimonia is France's largest gathering of professionals in the wealth management sector.

In 2025, for its 32nd edition, the Convention brought together 9,067 wealth management professionals from all over France to meet partners, network, learn, monitor developments and understand market trends.



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PATRIMONIA IN NUMBERS



+ 9067

Wealth Management
Experts



Adjacent to
400

Partners-Exhibitors



+ 110

Speeches



patrimonia

WHO IS EXHIBITING ?

Asset management company (UCITS)
Property developer/builder
SCPI management company
Real estate company
Private equity - Private Asset
Bank
Fund distribution platform
Fintech
Life insurance company
PSAN
Gold and precious metals service provider
GFV and GFF (vineyards and forestry groups,
etc.)
Service Provider
Consultants

WHO IS VISITING ?

Wealth management consulting experts:

WMA
Private banker
Financial adviser
Banking network account manager
Private manager
Family office
Fund selector
Wealth engineer
Estate agent
Insurance broker or mortgage broker
General agent
Chartered accountant
Solicitor
Lawyer...

WHY EXHIBIT?

DEMONSTRATE YOUR
EXPERTISE AND FOSTER
COLLABORATIONS

REASONS TO VISIT?

IDENTIFYING INNOVATIVE
SOLUTIONS OR PROPOSALS
FOR YOUR CLIENTS



LIST OF EXHIBITORS 2025

2ND MARKET REVENTE SCPI	AROXYS	CGP CONSEIL (AURIS GESTION)	ENTREPRENEUR INVEST	GENERALI ASSET MANAGEMENT
ABBOVE SA	ASSUREA	CGP ENTREPRENEURS	EPOPEE GESTION	S.P.A. SOCIETÀ DI GESTIONE DEL
ACCESS CAPITAL PARTNERS GROUP SA	ASTORG	CGPC	EPSICAP REIM	RISPARMIO - ETABLISSEMENT
ACTIVE ASSET ALLOCATION	ATLAND VOISIN	CHALLENGES	EQUITIM	FRANÇAIS
ACTUSITE	ATREAM	CHAMBRE INTERDEPARTEMENTALE DES	ERASMUS GESTION	GENERALI PATRIMOINE
ADVENIS REAL ESTATE INVESTMENT	AUREP	NOTAIRES DE LA COUR D'APPEL DE LYON	ERES	GESTION 21
MANAGEMENT	AUTOMATA FRANCE	CHLOE IN THE SKY	ERES	GIE ABEILLE ASSURANCES
AESTIAM	AVALOQ LUXEMBOURG	CITIGROUP GLOBAL MARKETS EUROPE AG	EUODIA	GODOT ET FILS VERSAILLES
AEW	AXA FRANCE VIE - THEMA	CITYWIRE	EURAZEO	GOLDMAN SACHS PARIS
AFG - ASSOCIATION FRANÇAISE DE	AXA IM SELECT FRANCE	CLARTAN ASSOCIES	EURONEXT	GOLDMAN SACHS PARIS INC ET
GESTION	AXIOM ALTERNATIVE INVESTMENTS	CLUB PATRIMOINE	EXANE ASSET MANAGEMENT	CIE
AFI ESCA PATRIMOINE	AXIPITREAL ESTATE PARTNERS	CNAVS / A2P	EXCELIANCES	GOODVEST
AG2R LA MONDIALE GESTION D'ACTIFS	AYDO	CNCEF	EXTENDAM	GREENMAN ARTH
AGARIM	BALESTRA	CNCGP	FAIR	GRIDKY
AGEA	BALOISE VIE LUXEMBOURG	CNP ASSURANCES	FASST	GROUPAMA EPARGNE SALARIALE
AGEFI SA	BALTIS	COGEFI GESTION	FECIF - FÉDÉRATION EUROPÉENNE DES	GROUPE CIR
AGPC	BANKKEYS	COINHOUSE	CONSEILS	GROUPE COLOCATERE
AGPP - ASSOCIATION DES GÉRANTS DE	BANQUE DELUBAC & CIE	COINSHARES ASSET MANAGEMENT	FEDERATION FRANCAISE DES	GROUPE CONFIANCE
AIR FUND	BANQUE NEUFLIZE OBC	COMGEST	ASSOCIATIONS DE CHIENS GUIDES	GROUPE EDOUARD DENIS
ALDERAN	BDJ	COMMISSARIAT GENERAL AU	D'AVEUGLES	GROUPE FICADE (X8)
ALIENOR CAPITAL	BDL CAPITAL MANAGEMENT	DEVELOPPEMENT DURABLE (CGDD)	FIDA	GROUPE LA FRANCAISE
ALLIANZ GLOBAL INVESTORS FRANCE	BITWISEINVESTMENTS	COMPTOIR GENERAL DES METAUX	FIDEXI	GROUPE MAGELLIM
ALLIANZ VIE	BLACKSTONE GROUP	PRECIEUX (CGMP)	FIDUCIAL GÉRANCE	GROUPE PREMIUM
ALTAREA INVESTMENT MANAGERS	BLOCKCHAIN PROCESS SECURITY	CONCILIO IMMOBILIER	FIGEN AI	H2O
ALTAREA SOLUTIONS & SERVICES	BNP PARIBAS ASSET MANAGEMENT	CONSULTIM GROUPE HOLDING	FIL GESTION	HABITAT ET HUMANISME
ALTER NATIVA	FRANCE	CONSULTIM GROUPE HOLDING	FINAIPRO	HARVEST
ALTERNATIVE SOFT	BNP PARIBAS CARDIF	CORUM L'EPARGNE	FINANCIERE D'UZES	HEXA PATRIMOINE
AMBOISE PARTNERS SA	BNP PARIBAS PRIVALTO	CORUM L'EPARGNE	FINANC'ILE	HILBERT INVESTMENT SOLUTIONS
AMIRAL GESTION	BNP PARIBAS REIM FRANCE	COVEA FINANCE	FINZZLE GROUPE	HISTOIRE & PATRIMOINE
AMPLEGEST	BOURSE DIRECT	CPR ASSET MANAGEMENT	FLANKS	PARTENARIATS
ANACOFI	BRED - BANQUE POPULAIRE	DARWIN INVEST	FONCIA IMMO NEUF	HMG FINANCE
ANCDGP - ASSOC. NATIONALE DES	BRISBANE MEDIA - IDEAL INVESTISSEUR	DATAPUNK	FONCIÈRES ET TERRITOIRES	HORIZON AM
CONSEILS	CABINET IGC	DNCA FINANCE	FONDATION DE LA 2E CHANCE	HOTEL INVESTISSEMENT CAPITAL
ANGELOTTI PROMOTION	CANDRIAM FRANCE	DORVAL ASSET MANAGEMENT	FRANCE INVEST	HOUSEBASE
APCAL - ASSOCIATION PROFESSIONNELLE	CAP ESPANA	ECOFI INVESTISSEMENTS	FRANCE VALLEY	HSBC REIM
DES COURTIERS D'ASSURANCES	CAPITAL EXPLORER	EDMOND DE ROTHSCHILD ASSET	FRANÇOIS 1ER FINANCE	ICADE PROMOTION
APREDIA	CARMIGNAC GESTION	MANAGEMENT	FRANKLIN TEMPLETON INTERNATIONAL	IDWAN
ARC CAPITAL	CATELLA RESIDENTIAL PARTNERS	EDMOND DE ROTHSCHILD REIM (FRANCE)	SERVICES - FRENCH BRANCH	IMPACT PARTNERS
ARCHIMED	CCEF - COMPAGNIE DES CONSEILS	EFPA FRANCE	FUNDSMITH LLP	INDUSTRIAL INVEST
ARCHINVEST	CEGEDIM OUTSOURCING	EIFFEL INVESTMENT GROUP	FUNDVIS	INOCAP GESTION
ARDIAN FRANCE	CELENA AI	ELEVA CAPITAL	FVI	INTENCIAL PATRIMOINE
ARKEA ASSET MANAGEMENT	ENTRE DES PROFESSIONS FINANCIERES	ELYADE	GAY LUSSAC GESTION	
	CF GROUP HOLDING	ENKY	GEMWAY ASSETS	



LIST OF EXHIBITORS 2025

INTER GESTION REIM
INTER INVEST
INVECITY CAPITAL
INVESTSET
IRBIS SOLUTIONS
IROKO
ISRSELECT
IVO CAPITAL PARTNERS
J.P. MORGAN ASSET
MANAGEMENT
JANUS HENDERSON
KARBONALPHA
KAUFMAN & BROAD
KAUFMAN & BROAD
KEESYSTEM
KEREN FINANCE
KETIL MEDIA
LA COMPAGNIE DES CGP
LA FINANCIÈRE DE L'ECHIQUIER
LA FINANCIÈRE DE L'ECHIQUIER
LA FONDATION LES AMIS DE
L'ARCHE
LA PREMIERE BRIQUE
LAZARD FRÈRES GESTION
LBO FRANCE GESTION
LE CONSERVATEUR
LE REVENU FRANCAIS EDITION
LE REVENU PIERRE
LEDGITY SAS
LEFEBVRE DALLOZ LOGICIELS
LEONTEQ SECURITIES (EUROPE)
GMBH
LES ECHOS
LES ECHOS
LES ECHOS
LES ENTREPRÊTEURS
LES NOUVEAUX CONSTRUCTEURS
LEXISNEXIS
LINGOT.COM
LP PROMOTION
LS ADVISORS LTD
LWS-HOSPITALITY

LYNCEUS PARTNERS GROUP AG
M CAPITAL
M&G LUXEMBOURG SA
MAGNACARTA
MALAKOFF HUMANIS
MANDARINE GESTION
MAREX SA
MATA CAPITAL IM
MATIS
MEDIOBANCA SPA
MERCY PROSPER
METLIFE
MFEX FRANCE
MIMCO
MINDSTON CAPITAL
MIRABAUD ASSET MANAGEMENT
MISSION ENERGIE
MMA VIE
MNK PARTNERS
MON LIVRET C
MONALIZA
MONETA ASSET MANAGEMENT
MONOCLE ASSET MANAGEMENT
MONTPENSIER FINANCE
MORNINGSTAR FRANCE FUND
INFORMATION
MOZART DIGITAL
MURANO
MUSTCOMPLIANCE
MYGESTIONPRIVÉE
NATIXIS INVESTMENT MANAGERS
INTERNATIONAL
NEXITY PATRIMOINE
NEXT GEN VALUE INVESTING
NEXTSTAGE AM
NORMA CAPITAL
NORTIA
NOUVEAU SIÈCLE
NOVAXIA
O2 CAPITAL
OCÉANIS PROMOTION
ODDO BHF

OEC SERVICES
OFI INVEST
OG2I
OIKOCREDIT
OPALE CAPITAL
OPENSTONE
OPERA DE LYON
OPTIMA CAPITAL
OPTION FINANCE
ORADEA VIE
ORIAS - REGISTRE UNIQUE DES
INTERMEDIAIRES EN ASSURANCE
BANQUE FINANCE
OSEOM FINANCE
OTAREE
PAREF GESTION
PATRIMETA
PATRIMONIA CAPITAL
PAYMIUM SAS
PEQAN
PERIAL ASSET MANAGEMENT
PERLIS
PHIADVISOR VALQUANT
PICTET ASSET MANAGEMENT (EUROPE)
SA
PIERRE & SENS DEVELOPPEMENT
PIERRE DE SEINE
PIERRE PREMIER GESTION
PIERRE-LOYERS CONSEIL
PLANETE CSCA
PLUGIMMO
PONOTECH
PRAEMIA REIM FRANCE
PRINCIPAL REAL ESTATE SAS
PRIVATE CORNER
PROCIVIS UES AP
PROVAL INVEST
QUALIRETRAITE
QUINTET LUXEMBOURG PRIVATE BANK
QWARKS
RAIZERS
REMAKE ASSET MANAGEMENT

RICHELIEU INVEST
ROTHSCHILD & CO ASSET MANAGEMENT
ROUNDTABLE
SANSO LONGCHAMP AM
SASU IZZLY
SAXO BANK AS
SCALE UP CAPITAL
SCIC LES 3 COLONNES
SEBDO - LE POINT
SELENCIA PATRIMOINE
SENDRAISE
SEVEN 2
SEZAME SAS
SIENNA GESTION
SIGEFI PRIVATE EQUITY
SIMULABOX
SINTORIN FISCALITE
SOCIÉTÉ FORESTIÈRE DE LA CDC
SOCIÉTÉ GÉNÉRALE
SOFIDY
SOGENIAL IMMOBILIER
SOLUTIS FINANCE
SOWEFUND SAS
SPIRIT SAS
SQUARE PARTNERS INVESTMENT MANAGERS
STAR INVEST
STOREBRAND AM
SWEN CAPITAL
SWISS LIFE ASSET MANAGERS FRANCE
SWISS LIFE ASSURANCE ET PATRIMOINE
SWISS LIFE LUXEMBOURG
SWISSQUOTE BANK EUROPE SA
SYCOMORE ASSET MANAGEMENT
SYQUANT CAPITAL
TELAMON
TERRÉSENS
TESTAMENT SOLIDAIRE
TFS SOLUTIONS
THE GOOD VALUE
THE LHOFT - LUXEMBOURG HOUSE OF FINANCIAL
TECHNOLOGY

THE ONELIFE COMPANY SATHEOREIM
TIKEHAU INVESTMENT MANAGEMENT
TILVEST
TREASY
TRIACTIS
TUDIGO
UAF LIFE PATRIMOINE
UBS EUROPE SE
UME
UNEP
UPSLIDE
URBAN INVESTISSEMENT
UREG
UTWIN
VAERDI
VALDAMIS - ID L'INFO DURABLE
VALHYR CAPITAL
VALORISSIMO
VALORITY PARTNERS
VARENNE CAPITAL PARTNERS
VASCO
VATEL CAPITAL
VEGA INVESTMENT MANAGERS
VIE PLUS - SURAVENIR
VINCI IMMOBILIER
VONTOBEL ASSET MANAGEMENT S.A
WE ARE OLIVIA
WEALTH DYNAMIX
WEALTHCOME
WEINBERG CAPITAL PARTNERS
WENOVA ASSET MANAGEMENT
WIZ EXPERT
WIZIO
WY
XERYS INVEST
YOMONI
ZENITH INVESTMENT SOLUTIONS
ZODIA CUSTODY
ZOOM INVEST

MOMENTS OF SHARING, CONVIVIALITY AND EXCHANGE, AROUND...

OF AN AWARDS CEREMONY

WMA and its partner exhibitors will be honoured



OF A DIGITAL FACTORY

Demonstrations and the exploration of innovative technological solutions that can enhance the daily execution of various tasks.



EXPERTS DEBATE

Enhance your understanding of contemporary issues and deepen your insights into specific markets.



A PODIUM

Strategies for cultivating a practice and fostering customer loyalty.



PROFESSIONAL ADVICE

Uncovering solutions and insights from heritage professionals.



CONFERENCES

Strategies for cultivating a practice and fostering customer loyalty.



WHAT ARE THE OPINIONS OF THE EXHIBITORS AND VISITORS REGARDING PATRIMONIA?



Adjacent to **82 %**

VISITORS REPORTED A HIGH LEVEL OF SATISFACTION WITH THEIR PARTICIPATION IN THE PATRIMONIA 2025* CONVENTION.



Adjacent to **94%**

EXHIBITORS MET THEIR PARTICIPATION TARGETS.*

Adjacent to **88%**

WERE SATISFIED WITH THEIR ENGAGEMENT IN THE EXPERT DEBATE OR PROFESSIONAL ADVICE*.



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*SOURCE : 2025 SATISFACTION SURVEY

DO YOU HAVE ANY
INQUIRIES?

TO EXHIBIT ? YOUR BUSINESS CONTACTS :



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patrimonia

STAY INFORMED BY FOLLOWING US ON
SOCIAL MEDIA!



LINKEDIN



INSTAGRAM



YOUTUBE

INFOPRO DIGITAL

A group focused on the needs of professionals

Our strategy is focused on addressing the needs of professionals within our six communities:

AUTOMOTIVE

CONSTRUCTION

ASSURANCE AND FINANCE

DISTRIBUTION

INDUSTRY

PUBLIC SECTOR

INFOPRO DIGITAL IS A LEADING GROUP IN B2B INFORMATION AND SERVICES.

- 550M€ revenue
- 4,000 employees
- 10th largest technology group in France (FW 2020 ranking)
- 20% annual growth since its inception in 2001
- 50% of the business operates internationally, with a presence in 21 countries outside of France.

Our brands primarily consist of market-leading products and services:

SALONS
PROFESSIONNELS
& CONGRÈS



MÉDIAS
& NETWORKING



L'USINENOUVELLE



LE MONITEUR