



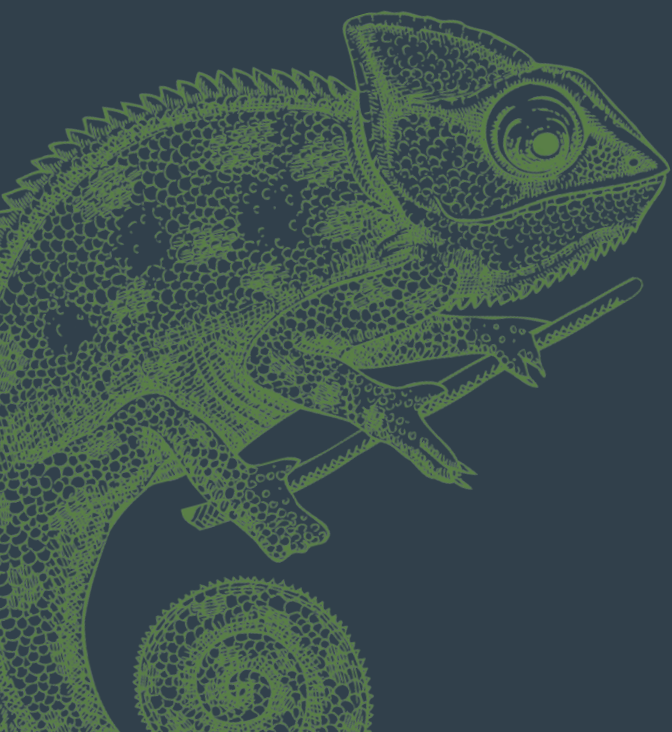
patrimonia

“Proximity and ingenuity at the  
heart of evolving values”

September 30 and October 1, 2026

at the Lyon Convention Center, France

 infoprodigital



## 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.



**patrimonia**  
20 26





## PATRIMONIA IN NUMBERS



+ 9067

Wealth  
Management  
Experts



Adjacent to

400

Partners-  
Exhibitors




+ 110

Speeches



## WHO IS EXHIBITING?

Providers of savings instruments and financial or real estate investments:




- 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

## WHY EXHIBIT?

DEMONSTRATE YOUR EXPERTISE AND FOSTER COLLABORATIONS

## 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...

## REASONS TO VISIT?

IDENTIFYING INNOVATIVE SOLUTIONS OR PROPOSALS FOR YOUR CLIENTS



# LIST OF EXHIBITORS 2025

2ND MARKET REVENTE SCPI  
ABOVE SA  
ACCESS CAPITAL PARTNERS GROUP SA  
ACTIVE ASSET ALLOCATION  
ACTUSITE  
ADVENIS REAL ESTATE INVESTMENT MANAGEMENT  
AESTIAM  
AEW  
AFG - ASSOCIATION FRANÇAISE DE GESTION  
AFI ESCA PATRIMOINE  
AG2R LA MONDIALE GESTION D'ACTIFS  
AGARIM  
AGEA  
AGEFI SA  
AGPC  
AGPP - ASSOCIATION DES GÉRANTS DE  
AIR FUND  
ALDERAN  
ALIENOR CAPITAL  
ALLIANZ GLOBAL INVESTORS FRANCE  
ALLIANZ VIE  
ALTAREA INVESTMENT MANAGERS  
ALTAREA SOLUTIONS & SERVICES  
ALTER NATIVA  
ALTERNATIVE SOFT  
AMBOISE PARTNERS SA  
AMIRAL GESTION  
AMPLEGEST  
ANACOFI  
ANCDGP - ASSOC. NATIONALE DES CONSEILS  
ANGELOTTI PROMOTION  
APCAL - ASSOCIATION PROFESSIONNELLE DES COURTIER D'ASSURANCES  
APREDIA  
ARC CAPITAL  
ARCHIMED  
ARCHINVEST  
ARDIAN FRANCE  
ARKEA ASSET MANAGEMENT

AROXYs  
ASSUREA  
ASTORG  
ATLAND VOISIN  
ATREAM  
AUREP  
AUTOMATA FRANCE  
AVALOQ LUXEMBOURG  
AXA FRANCE VIE - THEMA  
AXA IM SELECT FRANCE  
AXIOM ALTERNATIVE INVESTMENTS  
AXIPITREAL ESTATE PARTNERS  
AYDO  
BALESTRA  
BALOISE VIE LUXEMBOURG  
BALTIS  
BANKKEYS  
BANQUE DELUBAC & CIE  
BANQUE NEUFLIZE OBC  
BDJ  
BDL CAPITAL MANAGEMENT  
BITWISEINVESTMENTS  
BLACKSTONE GROUP  
BLOCKCHAIN PROCESS SECURITY  
BNP PARIBAS ASSET MANAGEMENT FRANCE  
BNP PARIBAS CARDIF  
BNP PARIBAS PRIVALTO  
BNP PARIBAS REIM FRANCE  
BOURSE DIRECT  
BRED - BANQUE POPULAIRE  
BRISBANE MEDIA - IDEAL INVESTISSEUR  
CABINET IGC  
CANDRIAM FRANCE  
CAP ESPANA  
CAPITAL EXPLORER  
CARMIGNAC GESTION  
CATELLA RESIDENTIAL PARTNERS  
CCF - COMPAGNIE DES CONSEILS  
CEGEDIM OUTSOURCING  
CELENA AI  
ENTRE DES PROFESSIONS FINANCIERES  
CF GROUP HOLDING

CGP CONSEIL (AURIS GESTION)  
CGP ENTREPRENEURS  
CGPC  
CHALLENGES  
CHAMBRE INTERDEPARTEMENTALE DES NOTAIRES DE LA COUR D'APPEL DE LYON  
CHLOE IN THE SKY  
CITIGROUP GLOBAL MARKETS EUROPE AG  
CITYWIRE  
CLARTAN ASSOCIES  
CLUB PATRIMOINE  
CNAVS / A2P  
CNCEF  
CNCGP  
CNP ASSURANCES  
COGEFI GESTION  
COINHOUSE  
COINSHARES ASSET MANAGEMENT  
COMGEST  
COMMISSARIAT GENERAL AU DEVELOPPEMENT DURABLE (CGDD)  
COMPTOIR GENERAL DES METAUX PRECIEUX (CGMP)  
CONCILIO IMMOBILIER  
CONSULTIM GROUPE HOLDING  
CORUM L'EPARGNE  
COVEA FINANCE  
CPR ASSET MANAGEMENT  
DARWIN INVEST  
DATAPUNK  
DNCA FINANCE  
DORVAL ASSET MANAGEMENT  
ECOFI INVESTISSEMENTS  
EDMOND DE ROTHSCHILD ASSET MANAGEMENT  
EDMOND DE ROTHSCHILD REIM (FRANCE)  
EFPA FRANCE  
EIFFEL INVESTMENT GROUP  
ELEVA CAPITAL  
ELYADE  
ENKY

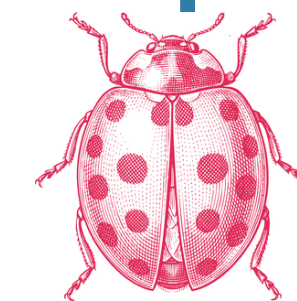
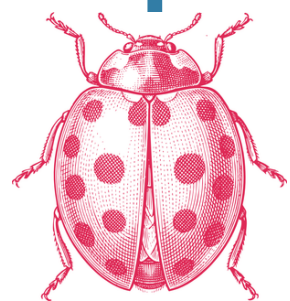
ENTREPRENEUR INVEST  
EPOPEE GESTION  
EPSICAP REIM  
EQUITIM  
ERASMUS GESTION  
ERES  
ERES  
EUODIA  
EURAZEO  
EURONEXT  
EXANE ASSET MANAGEMENT  
EXCELIANCES  
EXTENDAM  
FAIR  
FASST  
FECIF - FÉDÉRATION EUROPÉENNE DES CONSEILS  
FEDERATION FRANCAISE DES ASSOCIATIONS DE CHIENS GUIDES D'AVEUGLES  
FIDA  
FIDEXI  
FIDUCIAL GÉRANCE  
FIGEN AI  
FIL GESTION  
FINAIPRO  
FINANCIERE D'UZES  
FINANC'ILE  
FINZZLE GROUPE  
FLANKS  
FONCIA IMMO NEUF  
FONCIÈRES ET TERRITOIRES  
FONDATION DE LA 2E CHANCE  
FRANCE INVEST  
FRANCE VALLEY  
FRANÇOIS 1ER FINANCE  
FRANKLIN TEMPLETON  
INTERNATIONAL SERVICES - FRENCH BRANCH  
FUNDSMITH LLP  
FUNDVIS  
FVI  
GAY LUSSAC GESTION  
GEMWAY ASSETS

GENERALI ASSET MANAGEMENT S.P.A. SOCIETÀ DI GESTIONE DEL RISPARMIO - ETABLISSEMENT FRANÇAIS  
GENERALI PATRIMOINE GESTION 21  
GIE ABEILLE ASSURANCES  
GODOT ET FILS VERSAILLES  
GOLDMAN SACHS PARIS  
GOLDMAN SACHS PARIS INC ET CIE  
GOODVEST  
GREENMAN ARTH  
GRIDKY  
GROUPAMA EPARGNE SALARIALE  
GROUPE CIR  
GROUPE COLOCATERE  
GROUPE CONFIANCE  
GROUPE EDOUARD DENIS  
GROUPE FICADE (X8)  
GROUPE LA FRANCAISE  
GROUPE MAGELLIM  
GROUPE PREMIUM  
H2O  
HABITAT ET HUMANISME  
HARVEST  
HEXA PATRIMOINE  
HILBERT INVESTMENT SOLUTIONS  
HISTOIRE & PATRIMOINE  
PARTENARIATS  
HMG FINANCE  
HORIZON AM  
HOTEL INVESTISSEMENT CAPITAL  
HOUSEBASE  
HSBC REIM  
ICADE PROMOTION  
IDWAN  
IMPACT PARTNERS  
INDUSTRIAL INVEST  
INOCAP GESTION  
INTENCIAL PATRIMOINE



# LIST OF EXHIBITORS 2025

INTER GESTION REIM	LYNCEUS PARTNERS GROUP AG	OEC SERVICES	RICHELIEU INVEST	THE ONELIFE COMPANY
INTER INVEST	M CAPITAL	OFI INVEST	ROTHSCHILD & CO ASSET MANAGEMENT	SATHEOREIM
INVECITY CAPITAL	M&G LUXEMBOURG SA	OG2I	ROUNDTABLE	TIKEHAU INVESTMENT
INVESTSET	MAGNACARTA	OIKOCREDIT	SANSO LONGCHAMP AM	MANAGEMENT
IRBIS SOLUTIONS	MALAKOFF HUMANIS	OPALE CAPITAL	SASU IZZLY	TILVEST
IROKO	MANDARINE GESTION	OPENSTONE	SAXO BANK AS	TREASY
ISRSELECT	MAREX SA	OPERA DE LYON	SCALE UP CAPITAL	TRIACTIS
IVO CAPITAL PARTNERS	MATA CAPITAL IM	OPTIMA CAPITAL	SCIC LES 3 COLONNES	TUDIGO
J.P. MORGAN ASSET	MATIS	OPTION FINANCE	SEBDO - LE POINT	UAF LIFE PATRIMOINE
MANAGEMENT	MEDIOBANCA SPA	ORADEA VIE	SELENCIA PATRIMOINE	UBS EUROPE SE
JANUS HENDERSON	MERCI PROSPER	ORIAS - REGISTRE UNIQUE DES	SENDRAISE	UME
KARBONALPHA	METLIFE	INTERMEDIAIRES EN ASSURANCE	SEVEN 2	UNEP
KAUFMAN & BROAD	MFEX FRANCE	BANQUE FINANCE	SEZAME SAS	UPSLIDE
KEESYSTEM	MIMCO	OSEOM FINANCE	SIENNA GESTION	URBAN INVESTISSEMENT
KEREN FINANCE	MINDSTON CAPITAL	OTAREE	SIGEFI PRIVATE EQUITY	UREG
KETIL MEDIA	MIRABAUD ASSET	PAREF GESTION	SIMULABOX	UTWIN
LA COMPAGNIE DES CGP	MANAGEMENT	PATRIMETA	SINTORIN FISCALITE	VAERDI
LA FINANCIERE DE	MISSION ENERGIE	PATRIMONIA CAPITAL	SOCIÉTÉ FORESTIÈRE DE LA CDC	VALDAMIS - ID L'INFO DURABLE
L'ECHIQUIER	MMA VIE	PAYMIUM SAS	SOCIÉTÉ GÉNÉRALE	VALHYR CAPITAL
LA FINANCIERE DE	MNK PARTNERS	PEQAN	SOFIDY	VALORISSIMO
L'ECHIQUIER	MON LIVRET C	PERIAL ASSET MANAGEMENT	SOGENIAL IMMOBILIER	VALORITY PARTNERS
LA FONDATION LES AMIS DE	MONALIZA	PERLIS	SOLUTIS FINANCE	VARENNE CAPITAL PARTNERS
L'ARCHE	MONETA ASSET MANAGEMENT	PHIADVISOR VALQUANT	SOWEFUND SAS	VASCO
LA PREMIERE BRIQUE	MONOCLE ASSET	PICTET ASSET MANAGEMENT	SPIRIT SAS	VATEL CAPITAL
LAZARD FRÈRES GESTION	MANAGEMENT	(EUROPE) SA	SQUARE PARTNERS INVESTMENT MANAGERS	VEGA INVESTMENT MANAGERS
LBO FRANCE GESTION	MONTPENSIER FINANCE	PIERRE & SENS DEVELOPPEMENT	STAR INVEST	VIE PLUS - SURAVENIR
LE CONSERVATEUR	MORNINGSTAR FRANCE FUND	PIERRE DE SEINE	STOREBRAND AM	VINCI IMMOBILIER
LE REVENU FRANCAIS EDITION	INFORMATION	PIERRE PREMIER GESTION	SWEN CAPITAL	VONTOBEL ASSET MANAGEMENT
LE REVENU PIERRE	MOZART DIGITAL	PIERRE-LOYERS CONSEIL	SWISS LIFE ASSET MANAGERS FRANCE	S.A
LEDGITY SAS	MURANO	PLANETE CSCA	SWISS LIFE ASSURANCE ET PATRIMOINE	WE ARE OLIVIA
LEFEBVRE DALLOZ LOGICIELS	MUSTCOMPLIANCE	PLUGIMMO	SWISS LIFE LUXEMBOURG	WEALTH DYNAMIX
LEONTEQ SECURITIES	MYGESTIONPRIVÉE	PONOTECH	SWISSQUOTE BANK EUROPE SA	WEALTHCOME
(EUROPE) GMBH	NATIXIS INVESTMENT	PRAEMIA REIM FRANCE	SYCOMORE ASSET MANAGEMENT	WEINBERG CAPITAL PARTNERS
LES ECHOS	MANAGERS INTERNATIONAL	PRINCIPAL REAL ESTATE SAS	SYQUANT CAPITAL	WENOVA ASSET MANAGEMENT
LES ENTREPRÊTEURS	NEXITY PATRIMOINE	PRIVATE CORNER	TELAMON	WIZ EXPERT
LES NOUVEAUX	NEXT GEN VALUE INVESTING	PROCIVIS UES AP	TERRÉSENS	WIZIO
CONSTRUCTEURS	NEXTSTAGE AM	PROVAL INVEST	TESTAMENT SOLIDAIRE	WY
LEXISNEXIS	NORMA CAPITAL	QUALIRETRAITE	TFS SOLUTIONS	XERYS INVEST
LINGOT.COM	NORTIA	QUINTET LUXEMBOURG PRIVATE	THE GOOD VALUE	YOMONI
LP PROMOTION	NOUVEAU SIÈCLE	BANK	THE LHOFT - LUXEMBOURG HOUSE OF	ZENITH INVESTMENT SOLUTIONS
LS ADVISORS LTD	NOVAXIA	QWARKS	FINANCIAL	ZODIA CUSTODY
LWS-HOSPITALITY	O2 CAPITAL	RAIZERS	TECHNOLOGY	ZOOM INVEST
	OCÉANIS PROMOTION	REMAKE ASSET MANAGEMENT		
	ODDO BHF			



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## 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\*.

# DO YOU HAVE ANY INQUIRIES?

## TO EXHIBIT ? YOUR BUSINESS CONTACTS :



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**CHRISTELLE FOUGEROUX**  
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01 79 06 77 19



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patrimonia

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et des collectivités locales

s.i.Mi.

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