



## **Who are we?**

Octarine is a B2B consultancy focused exclusively on providing value-added support services to regulated financial services businesses.

As experienced financial professionals ourselves, we have practical knowledge of all aspects of our industry and can help businesses to thrive even in the most challenging of circumstances.

## **What do we offer?**

Due to the nature of our industry, all financial services companies face continued operational and regulatory challenges. These obstacles (or kite marks if you wish to be positive) have to be negotiated before you can begin to focus on the commercial aspects of running a successful enterprise. The issue facing many businesses is not that they don't recognise they have a problem but simply that they lack the time or resource to address it.

This is where Octarine comes in.

Octarine is a resource that can be deployed to analyse, identify and solve problems. This can be at the "heavy end", i.e. regulatory, compliance, processes and IT systems, through to the development and growth of your business which might include staff training, client marketing, geographical expansion and, of course, the eventual sale of the business.

## **Why Octarine?**

We are a dedicated financial services consultancy staffed by industry-qualified professionals with experience of starting, developing, acquiring, merging and selling financial services businesses.

We have first hand experience of obtaining regulatory licenses on behalf of others including several from overseas jurisdictions. In addition, we have a detailed knowledge of the life, investment and pensions sectors including international pension transfers.

## **How can we help?**

All business owners should have an exit strategy. We can help you to implement your plan and ensure that you are able to maximise the value of your business. But you can only achieve that goal if you have optimised your commercial strengths and addressed any inherent operational weaknesses, including legacy issues.

When we take on a new client, we start by completing a questionnaire. This document is as thorough as a pre-sale, due-diligence questionnaire and very few firms score well initially. Our role is to ensure that once you come to complete such a document for a future buyer, your high score will ensure a successful and profitable outcome.

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