

18.

Caser Asesores Financieros



For Caser Asesores Financieros 2020, this brought about significant development and growth of its network and resulted in an increase in the volume of assets under management.

In an year marked by high market volatility, Caser Asesores Financieros was able to consolidate its business model within the Company, and focused its efforts on attracting the most qualified professionals with extensive experience in wealth advisory.

At the end of December they had a network consisting of 35 advisers distributed in different areas of Spain (Madrid, Barcelona, Pamplona, Granada, Malaga and Seville, as

In 2020, Caser Asesores Financieros had a net growth of 185 million euros and more than eight hundred clients

well as in the east of Spain) and closed the year above the target set. In 2020 Caser Asesores Financieros achieved net business volume of 185 million euros of equity –with 87% of the volume being investment funds– and added 364 new clients and closed the year with more than 800 clients with an average investment of €240,000.

In terms of financial services, the commitment to trust and proximity resulted in increased demand for the advisory service, which became the most requested by clients during the year.

With respect to its offer, Caser Asesores Financieros maintained its commitment to a comprehensive proposition offering financial products, pensions and insurers. It also planned and set up an open architecture in investment funds of both Spanish and foreign managers, as well as access to equity markets (shares and ETFs) in the Spanish, European and American market, as well as the fixed income market.



BOOSTING THE NETWORK OF FINANCIAL ADVISORS

During the course of the year, and within the expansion plan, Caser Asesores Financieros reaffirmed its commitment to talent and quality advice with the incorporation of professionals such as Reyes Barquero and Jaime Abad in Seville, Susana Checa, in Malaga and Juan Pablo Ordovás, in charge of the east of Spain.

In addition, the entity also incorporated Javier Barallat to its Madrid team, thus strengthening its commitment to quality advice in the capital.

With extensive knowledge and a long track record in the financial world, the advisors are the heart of the project, strengthening the foundations of its advisory model and with a focus on the advisors' relationship with the client throughout 2020.



At the same time, work continued throughout the year to boost and give visibility to the Caser Asesores Financieros brand name, enhancing its growth and dissemination in media and social channels.

A drive which has been taken place in a context of banking transformation that has favoured the entity's business model. This was due, first, to the increase in the number of professionals with experience in the world of financial advice who have sought to further develop their career and, second, to the emergence of new players such as insurance companies.

What happened in 2020 has forced everyone to change and speed up many processes, with technology playing an essential role both in communicating with customers and in creating new products and services that have improved the quality of advice. Caser Asesores Financieros achieved a high degree of digitisation in its service offer, adapted the business model to the environment and worked hard to respond to the needs of both advisors and clients. A commitment inherent in the entity's DNA that was reflected in the good sales results at the end of the year.



HELENA CALAFORRA
DIRECTOR OF CASER ASESORES
FINANCIEROS

Covid-19 marked the course of 2020. Where have you focused your efforts?
It has certainly been an year marked by a unique context that has compelled us to achieve even better proximity with our clients. In this regard, trust and knowledge of clients' needs is one of the most important concerns that we have focused on throughout

the year. Our intention is not to be the biggest. We want to be the most flexible and the most suitable to meet the expectations of both clients and their advisors. For this reason, our efforts throughout the year have focused particularly on attracting more high quality and professional advisors, to the point we can surpass our goal for the year.

What goals have you set for 2021?
We remain committed to becoming a leader in the world of financial advice. To achieve this, we continue to set ourselves the objective of having one hundred financial advisors by 2022 and 1.5 billion euros of assets, as well as continuing to expand our presence at the national level.

Therefore, we will continue to focus on attracting the best talent and offering a comprehensive and global financial advice service to meet the current demands of the market.