

# Private Capital at Travers Smith

Spring 2026



*Strong commercial awareness, clear communication and a collaborative spirit that sets them apart from other law firms.*





**Will Normand**

Head of Asset Management  
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# Welcome

**We are market leading specialists across all the areas of legal expertise that an asset manager may need.**

That includes fundraising, secondaries, asset management M&A and fund finance. We act for both GPs and LPs and become their trusted counsel – bringing our private capital experience to whatever issue they face.

It's exciting to advise managers across the industry, from the largest multi-strategy players through to newly established GPs. We see an increasingly homogenized market where many law firms that advise private capital managers focus only on large cap fundraising – we offer a true point of difference by providing services tailored to each client's changing needs. And we are clear about our strengths: if we come to talk to you about a project or changing area of law, it's because we know we are the best people in the market to do that work.

Our clients really like this approach and it shows:

- We advise **half of the top 20 private equity managers** (PEI PE 300) and **more than half of the top 25 private credit managers** (PDI 200).
- We are European market leaders on evergreen semi-liquid structures and act for the largest global managers in this space.
- We advise on fundraisings across private equity, venture, credit, infrastructure, real estate and secondary strategies. The US is a crucial market and Luxembourg is a key jurisdiction: we partner with our best friend network to ensure a seamless and expert service.
- We bring together fund formation and M&A skills to advise on GP stakes, liquidity offerings and the set-up of new managers.

This brochure introduces our private capital work and the team. We look forward to speaking with you soon.



1.

A global service  
for private capital

# A global service for private capital

## A smarter approach for GPs and LPs

We offer a truly global service through a carefully curated network of top-tier counsel worldwide.

## Unmatched expertise, without limitations

Unlike firms with a fixed footprint, we hand-pick the best specialists for the deal at hand. We have particularly close alliances in Luxembourg and in the US and a strong track record of helping European sponsors to raise capital in the United States.

On a fundraising, you'll have one engagement letter and one invoice. We'll deliver your fundraising, acting as a single point of contact. The same approach applies to any advisory work. But if you'd prefer us to work with a particular firm in a jurisdiction, we can, including if they are a competitor.

Because we do not have global offices, we provide premium cross-border services at competitive, local rates. This is a well trodden path for us - there is no duplication of effort or cost.

## Investment in our international network

We meet with hundreds of law firms every year, identifying a select group of partner law firms who share our specialist strengths and can match our demanding service standards, at the right price point.

“

*A fluent cross-border service is possible thanks to the assistance of trusted overseas firms, with the London team acting as a lynchpin in the management of work across jurisdictions.*

**Chambers and Partners**

“

*This was a complicated, multi-jurisdictional matter and just the sort of matter that we turn to Travers Smith for. The Travers team expertly managed the process and provided us with the first-class service that we have come to expect.*

**Anonymous client testimonial**

# 2.

## Fundraising

Evergreen semi-liquid funds

Private capital fundraising



# Evergreen semi-liquid funds

The Travers Smith team, led by Will Normand, is Europe's market leader in evergreen, semi-liquid strategies. We cover all potential structures e.g. RAIF, Part II, ELTIF, and LTAF in the UK and, whatever route you choose, we can build-in future proofing to ensure flexibility.

Our position as market leader makes us uniquely placed to advise on distribution agreement terms, including key economics for seed investors and the latest practices around placement and trail fees and rebates.

Some of our most valued contributions are in the ongoing advice we provide to GPs after product launch: we've helped IR teams navigate onboarding with more than 75 distributors. Our experience spans the 3 key platforms: AllFunds, Clearstream and Euroclear.

Finally (but critically), we work closely with industry associations, with roles at the BVCA and at Invest Europe, where we chair the retailisation and ELTIF taskforces.

## Your key contacts



**Will Normand**

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**Leigh Stockey**

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**Ruby Davies**

Associate  
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*Will Normand is clearly one of the key partners in the London market when it comes to retail alternative investment funds.*

**Legal 500**

*The go-to practice for evergreen funds. Fast, efficient, strong team that are able to deliver excellent advice and manage projects on time without fuss.*

**Legal 500**

# Our experience



Acting on the launch of two sub-funds for **Carlyle AlpInvest Private Markets SICAV** in respect of its European private equity & secondaries strategies.

Stonepeak

Acting for **Stonepeak, the world's largest, independent infrastructure firm** on its European private wealth fund which invests alongside an equivalent product for US investors (launched in tandem).



Acting for **Dawson Partners** on its first European semi-liquid platform.

APOLLO

**Lead counsel for Apollo Global Management** on its semi-liquid Luxembourg fund range, primarily advising on distribution arrangements.



Acting for **Ares Wealth Management Solutions** on the global distribution arrangements for its semi-liquid Luxembourg fund range.

CONFIDENTIAL

Acting for another secondaries-specialist global GP to launch a semi-liquid platform.

# Private capital fundraising

We act on European-centric fundraisings across all alternative assets, but with particular strength in private equity and venture capital.

We are laser-focused on getting you to a successful and target-hitting close, quickly and smoothly. We build a team around your needs as you go to market, led by a Funds partner who can call on regulatory, tax, fund finance, derivatives and ESG expertise. Typically, a fundraise kicks-off with a conversation about structure and terms – what will your investors expect to see as you go to market?

We understand that pricing can be sensitive on a fundraise. You'll find us flexible and commercial in a way that marks us out from our competitors.



*The team are incredibly responsive, helpful and have a great understanding of the private funds market through their broad client base. One of their greatest strengths is the ease with which they coordinate with the other (excellent) teams in their firm (eg tax, regulatory) to give a full service.*

Legal 500

## Your key contacts



**Jeremy Elmore**

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**Will Normand**

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**Tosin Adeyeri**

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**Michael O'Brien Kelly**

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# Selected Fundraising Experience



Beech Tree  
PRIVATE EQUITY

BLUEGEM

CAPITAL  
PARTNERS



# 3.

## Asset Management M&A

GP stakes & strategic acquisitions

Setting up a new manager



# GP stakes and House M&A

We advise the largest alternative asset managers as they make strategic decisions to transform their businesses.

Whether you want to expand geographical coverage, add another strategy to your LP offering or increase AUM, buying an alternative asset manager is not run-of-the-mill M&A. These are high-stake transactions for your own business and having the right advisor is key.

We bring together a team of M&A, funds, regulatory and tax experts to provide technical and tactical advice on acquiring or selling an asset manager. Our extensive experience includes advising on the post-acquisition integration of the new business.



*The Travers Smith team is truly best in class. We have been able to count on the quality of their advice at critical points of many transactions we have worked on together. They have that rare ability to combine high quality legal advice with a commercial, market-based view and that continues to set them apart.*

**Raphael Grunschlag, William Blair**

## Your key contacts



**Victoria Bramall**

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**Alex Dixon**

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**Sarah Stewart**

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# House M&A, GP stakes and strategic partnerships experience

## MITSUBISHI ESTATE

Mitsubishi Estate on its acquisition of a majority interest in Patron Capital.

## THREE HILLS

Three Hills Capital on the sale of a minority stake to Canadian institutional investor British Columbia Investment Management Corporation.



Nest Corporation on the acquisition of a ten percent shareholding in Industry Super Holdings, the holding company of IFM Investors.

## 

EQT on strategic regulatory advice in relation to its acquisition of Collier Capital.



Benson Elliot Capital Management LLP (as it then was) on its sale to PineBridge Investment Holdings Europe.



Hunter Point Capital on its strategic partnership with Inflexion.



Abingworth on its sale to the Carlyle Group.

## 

Ex-Ardian executives on the establishment of a new global GP and strategic investment from Carmignac and General Atlantic.



Ares on its acquisition of Landmark Partners.



Canaccord Genuity Wealth Management on the acquisition of Hargreave Hale.



Canaccord Genuity on the investment by HPS Investment Partners in its UK wealth management division.



Ares in connection with its acquisition of a stake in BlueCove.



Lothbury Investment Management on its strategic partnership with Nomura Real Estate.



The partners of Medicxi on its spin-out from Index Ventures.



Brooks Macdonald Group on its acquisition of wealth manager Cornelian Asset Managers.



A global asset manager on the integration of a US property group into its business.

# Advising the house: inception to succession

Many of our fundraising clients have been with us from their inception. Whether you are starting from scratch or spinning out, we advise on negotiating the commercials between founders and we provide regulatory and tax solutions that get you to market quickly.

GPs that have matured under their founders then need to consider succession planning. Do they sell to a bigger player, hand the baton on to up-and-coming members of the existing team or seek additional capital? Either way, you need advisers who have done this before - multiple times - because every situation is different.



*Preeminent reputation in the asset management and funds space, Travers Smith provides an 'excellent service'.*

Legal 500

## CLIPWAY

Establishing a new global GP and advising on its debut \$bn multiples fund.



Advising on an LLP restructuring for a mid-market PE house.



Advising a new manager on the establishment of its debut fund that will make venture capital style investments in university "spin-out" companies.



Advising multiple managers on succession planning strategies, structures to facilitate a hand-over over time and negotiations to put these into play.



(Formerly Element Ventures). Establishing and launching its debut fintech venture fund (& subsequent funds).



Spinning out the life sciences team at Index Ventures to form a new business, Medicxi.



Spinning out the Irish-based private equity team from The Carlyle Group to form Melior Equity Partners.



Advised a long-standing family office client on the establishment of a new manager.



Spinning out a team from GCP Europe to form Kester Capital.



# 4.

## Investors & Secondaries

# Investors

Travers Smith advises large and sophisticated institutional investors across all alternative asset classes. We advise LPs as they deploy capital with GPs (via their flagship fund or a fund-of-one/SMA arrangement) and as they transact in the secondary markets.

We guide investors and LPACs through the most complex fund issues - conflicts of interest, GP-removal, key executive events and GP-led liquidity events.

What makes us stand-out is the comprehensive expertise we offer our LPs, particularly pension fund investors. Few other law firms advise pension fund investors on insurance buy-outs with multi-billion portfolio transfers and fewer still can boast a deep involvement in the UK Government's Mansion House reforms to encourage pension fund investment into alternative assets. We do all of that as well as understanding how to protect LPs from unexpected tax filings as they invest and advising on the commercial terms and regulatory impact of using derivatives as part of an investing strategy.



*Solutions oriented, great client dedication, commercial understanding.*

Legal 500

*David James – he has a way of making the difficult look easy.*

Legal 500

## Your key contacts



**Jeremy Elmore**

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**David James**

Head of Pensions  
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**Sarah Stewart**

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**Tom Margesson**

Partner  
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# Selected investor experience

## Direct Fund Investing



**BAE SYSTEMS**



## SMA's and Funds of One



**Bridgepoint**

**CONFIDENTIAL**

Advised a leading multi-national insurance company on its investment into a US credit fund of one.

**CONFIDENTIAL**

Advised a UK pension fund on the establishment of a UK and Irish real estate fund of one.

## Strategic Advice

THE  
**BRITISH STEEL**  
PENSION SCHEME



**LPP**

Local Pensions Partnership



# Secondaries

We've built our reputation in private capital on providing joined-up, technical and tactical advice. That joined-up approach is most evident in our Secondaries Transaction Group which brings together private equity deal discipline with funds expertise. Our lawyers are focused on deal execution and know what is 'market'.

Our Secondaries Transaction Group advises on the full range of private capital secondary market transactions, including GP-led liquidity solutions and LP portfolio secondary transactions. Our team has been at the forefront of these transactions since the inception of the market and has advised over 70 GPs, LPs and lenders on their secondary market activity.



*The Travers Smith funds practice has the strongest team I know for fund formation, fundraising and secondaries work.*

Chambers and Partners

## Your key contacts



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**Tosin Adeyeri**

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**Tom Margesson**

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**John Daghlian**

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# GP-led secondaries

## PROJECT BLUETAIL

Currently advising on Project Bluetail, a **confidential GP-led secondary transaction**.

£500,000,000

## CONFIDENTIAL

Currently advising on a **confidential GP-led secondary transaction**.

£180,000,000

## PROJECT QUANTUM

Advised secondary investor on its **investment into a two asset GP-led continuation fund**.

\$270,000,000

## PROJECT PITTSBURGH

Advised GP on **GP-led tender offer** backed by two secondary investors.

\$400,000,000

## PROJECT ABERLOUR

Advised GP on a **GP-led portfolio strip sale of co-investment assets into a continuation fund**, capitalised by a secondary investor.

\$130,000,000

## PROJECT SPHERE

Advised GP on a **GP-led sale of fund interests to four continuation funds** capitalised by five secondary investors.

\$1,200,000,000



GP-led transaction in respect of 14 life sciences venture/growth assets backed by Pantheon and LGT.



Ancala's growth fund acquisition of interests in Portsmouth Water, Biogen & Leep Utilities from Ancala Infrastructure Fund I.



GP-led syndication to Castlegate Investments of a fund of funds programme supporting 1,500 seed / early-stage companies.

# LP-side secondaries

## PROJECT CHAMONIX

Advised fund of funds buyer on **acquisition of LP portfolio** and stapled commitment.

\$60,000,000

## PROJECT AURORA

Advised seller on **sale of portfolio of LP interests** to one buyer.

\$215,000,000

## PROJECT RHINE

Advised fund of funds investor on the **acquisition of LP portfolio** from family office.

CONFIDENTIAL

## PROJECT ROME

Advised fund of funds seller on **sale of LP interests in a continuation fund to seven separate buyers**.

€339,000,000

## PROJECT WENGER

Advised secondary investor on **acquisition of LP portfolio**.

\$155,000,000

## PROJECT WOBURN

Advised **pension scheme on LP portfolio reorganisation**.

\$2,500,000,000



LP portfolio reorganisation with aggregate committed capital of \$2.25bn.



Portfolio sale of LP interests (aggregate NAV £hundreds of millions).



Portfolio sale of LP interests (aggregate NAV £hundreds of millions.)

# Alternative Insights Summit

# 5.

## Fund Finance



# Fund Finance

As you fundraise, you'll want LPA terms that give you the flexibility to deploy fund-level leverage.

With unparalleled experience in the European fund finance market, we advise lenders and borrowers on subscription line facilities, NAV and hybrid facilities, secondaries facilities, GP support / co-invest facilities and management fee facilities. We also support GPs across sophisticated products including synthetic leverage, rated facilities, ESG-linked facilities and repo/liquidity facilities.

The team has significant experience in advising at the intersection of fund finance and asset-backed lending including NAV, ABL and similar products for credit funds. We have helped finance over £10bn of credit assets, from leveraged finance loans to more esoteric assets such as sports and film finance receivables. We draw on expertise from our Fund Finance and Structured Finance practices, combining NAV products with securitisation, portfolio sale and forward flow techniques.



*Travers Smith are experts in our sector, so we receive the very best advice combined with sensible commerciality.*

Legal 500

## Your key contacts



**Charlie Bischoff**

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**Laura Smith**

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**Adam Burk**

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# Fund Finance



Global Investors

Allianz Global Investors on a trade finance securitisation structure.

ARDIAN

Advised a club of five international banks on a subscription facility for Ardian's latest secondaries fund.



Advised Ares as borrower on its fund finance arrangements.



Arrow Global on funding for a real estate and distressed assets platform.



Advised Charterhouse on its subscription and co-invest facilities for Fund X together with a stand-alone letter of credit facility.

CLIPWAY

Clipway on subscription and NAV facilities following our advice on its launch of a new global secondaries fund.

EQUISTONE

Advised Equistone Partners on its subscription and co-invest facilities for Fund VI.



A group of lenders led by SMBC on a NAV facility provided to an SPV managed by Partners Group.



Advised Pemberton on numerous subscription and SMA facilities for multiple funds.

BLUEGEM

CAPITAL  
PARTNERS

Bluegem on subscription, co-invest and NAV facilities across various funds.

CONFIDENTIAL

A multi-strategy manager with \$1 trillion AUM on various fund-level FX hedging arrangements.

CONFIDENTIAL

Advised the lenders on a hybrid facility made available to a GP-owned vehicle as part of a wider GP-led transaction.

TRAVERS.  
SMITH

# 6.

## Trusted Counsel



# Trusted Counsel

## We are trusted counsel to the world's largest GPs.

Those clients like our partner-led approach and our deep understanding of their business. They also like the breadth of expertise we bring across financial services, IP, data & technology, employment & immigration, ESG, tax, disputes & investigations and competition.

We invest time to understand how upcoming change will affect GPs. We lead on industry groups to influence thinking and we translate legislative change into operation-friendly advice.

Crucially, we understand the importance of being responsive, quick and wise when facing a crunch...whether that's action from a disgruntled employee, a tricky tax enquiry or a regulatory investigation. For the most intractable issues, you'll want our tenacious, resilient litigators by your side.

## Your key contacts



**Phil Bartram**

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**Sian Keall**

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**Elena Rowlands**

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**Louisa Chambers**

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**Heather Gagen**

Head of Dispute Resolution  
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*Technically brilliant and commercial team.*

*An all star team.*

*An extension of our in-house team.*

*Phil Bartram & Tim Lewis have unparalleled experience with all types of alternative asset managers and are masters at giving their clients commercial solutions.*

*Louisa Chambers...thoughtful, clear, pragmatic.*

**Legal 500**

# Trusted Counsel: case studies

## European Marketing

- We acted for a global asset manager with teams in London and Luxembourg. They wanted to expand their European marketing footprint with a mix of local recruits, plus travel by the London team.
- We negotiated with the regulators, advised on multi-jurisdictional tax (including carry) and managed the employment / immigration processes.

## EU and UK ESG Advice

- We advised a large, multi-strategy GP on implementation of UK and EU ESG rules, across all their funds including private equity and credit funds.
- This included blue-sky thinking on how to apply the SFDR to strategies transitioning towards clean energy.

## IP, Data & Technology

- We helped a large GP shut down a scam that used its brand to offer fraudulent investment opportunities.
- We act for several asset managers who have suffered data breaches and ransomware attacks. We gave the data protection and IP advice needed to meet their compliance obligations during these crises, but we also helped to protect their brands and maintain investor trust as a top priority.

## Incentivising a worldwide senior team

- A global GP wanted a smooth roll-out of a new worldwide incentivisation plan for their most senior team.
- That provided multi-jurisdictional tax, employment and regulatory advice. We project managed to a tight timeframe and helped draft the docs for implementation.



*Their commitment [to mentoring & guidance for junior lawyers] not only fosters technical excellence but also reflects a genuine sense of humanity and team spirit – qualities that are increasingly rare and greatly valued.*

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**Legal 500**

# Facing an investigation – internal, tax or regulatory

## Regulatory investigations and internal disciplinary reviews

We are expert at supporting clients at times of crisis, especially when there is a potential reputational risk. We have market-leading experience in regulatory enforcement and investigations. We advise on disciplinary proceedings and whistle-blowing and we conduct internal investigations. We understand how regulators think and how to engage with them to achieve the best outcome.

## Tax investigations

Tax authorities are increasingly assertive in questioning GPs' tax. We have expertise in dealing with investigations, particularly where carried interest, loans, RSUs, salaried members (and partnerships more generally) are under scrutiny. We have strong experience of managing enquiries where executives are vested in the outcome and we understand how disconcerting this is for your senior team.



*They offer first rate technical regulatory expertise and dispute resolution strategies which...is a rarely found combination which has exceptional business value.*

Legal 500

## Your key contacts



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# ESG and ESG litigation

## Navigating the rising tide

Travers Smith's multi-disciplinary ESG & Impact practice was established over 10 years ago and remains at the cutting edge of the ESG legal sector.

Our Dispute Resolution team is known for offering preventative counselling: we analyse your state of play to identify potential greenwashing pitfalls and other liability risks. We have particular experience in novel, large-scale and transactional claims, including "parent company liability" claims.

## Collaborative global lens

Sitting between the US and the EU, our international strategy allows us to call on the best local law experts when needed, which gives our clients access to true specialists in all jurisdictions. This is a point of distinction for our offering, given that there are relatively few such ESG and environmental specialists globally.

## Your key ESG contacts



**Heather Gagen**

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Co-Head of ESG & Impact  
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**Simon Witney**

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**Sarah-Jane Denton**

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**John Buttanshaw**

Partner, Co-Head of ESG & Impact  
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*She is razor sharp, steely when needed, commands the total confidence of her clients and a complete delight to work with.*

**Heather Gagen – Legal 500**

*Many teams are challenged meeting the complexities of the dynamic ESG ... landscape, but Travers Smith are unafraid to take a view to help companies navigate these uncharted waters.*

**Chambers**

# Navigating derivatives & structured products

We lead in advising UK, EU and US alternative asset managers on fund structures that can allow those clients to hedge (or gain exposure to) interest rate, FX, credit, equity, inflation and commodity risk. That includes synthetic exposure (total return swaps), asset level exposure and protection on deals between signing and completion.

Unusually in the European legal market, we have a strong practice advising on derivatives regulatory questions and on collateral and security packages. That includes being by your side to help you mitigate and rectify a regulatory breach, should that occur.

## Your key DSP contacts



**Jonathan Gilmour**

Head of Derivatives & Structured Products

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**Cindy Smith**

Senior Counsel

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*Jonathan Gilmour is very approachable, highly responsive, a true expert in his field, highly professional, and a pleasure to work with.*

**Legal 500**

*Jonathan is supremely knowledgeable, calm and responsive.*

**Chambers**

*An industry leader in this space.*

**Chambers**

# 7.

## Influence and recognition



TRAVERS SMITH

Alternative Insights 2024  
TRAVERS SMITH

Alternative Insights Summit

Alternative Insights 2024  
TRAVERS SMITH

Alternative Insights Summit

Politics change



Michael Raymond  
Partner, Travers

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# Industry leading

We are connected across the industry and represented on all key asset management bodies.

Being plugged-in to legislative change from an early stage means we can identify your next challenge and that critical insight will help future-proof your strategic planning.

But we use our voice in the industry to do more than listen-in – we engage and influence. Backed by our fantastic specialist knowledge counsels, our partners invest time and expertise to shape draft policies and to work with legislators on better-targeted and operationally workable rules.



# Recognition

Advisory/Consultancy:  
**Tax Team of the Year**  
The Drawdown Awards 2025



**ESG Practice: Client Service prize**  
Legal ESG Awards 2025



**Pensions Law Firm of the Year**  
Pensions Age Awards 2025



**Legal Adviser of the Year**  
The Real Deals ESG Awards 2024



**Legal, Compliance and  
Regulatory Adviser of the Year**  
Drawdown Awards 2024



**"Highly commended" for  
Corporate Team of the Year**  
The Lawyer Awards 2024



**"Commended" for Sustainability  
Initiative of the Year**  
The Lawyer Awards 2024



**"Highly commended" for  
Best Law Firm Advisory Team:**  
**Sustainable Finance** Legal 500's  
ESG Awards 2024 Tier 1



**Fund Financing: Advisory  
Services Team of the Year**  
The Drawdown Awards 2023



Advisory/Consultancy:  
**Tax Team of the Year**  
The Drawdown Awards 2023



**Private Equity Team of the Year**  
Legal Business Awards 2022



**Legal Fund Formation  
Team of the Year**  
The Drawdown Awards  
2022, 2021 and 2020



**Law Firm of the Year: Fund  
Structuring**  
Unquote BPE Awards  
2021, 2018 and 2017



**Pensions Law Firm of the Year**  
FT Pensions Investment  
& Providers Awards 2021



**Pensions Lawyers of the Year**  
UK Pensions Awards 2021



# Our Alternative Insights Summit

Since its inception in 2022, hundreds of private capital industry leaders attend our annual Alternative Insights Summit in London.

In previous years, the speaker line up included Apollo, Blackstone, EQT, Inflexion, Investec, Pemberton and Stonepeak.

We were also joined this past year by keynote speakers Todd Buchholz, former director for Economic Policy at the White House and MD of the \$15 billion Tiger hedge fund, as well as former Chancellor and Shadow Chancellor George Osborne and Ed Balls.



*Excellent as usual – really valuable insight in areas that few others have conferences on.*

Attendee



*Not to be missed event.*

Attendee



*Great format and topics: the AM lens makes this more useful than many other events.*

Attendee



*Probably the best law firm event I've been to.*

Attendee

## Alternative Insights Summit





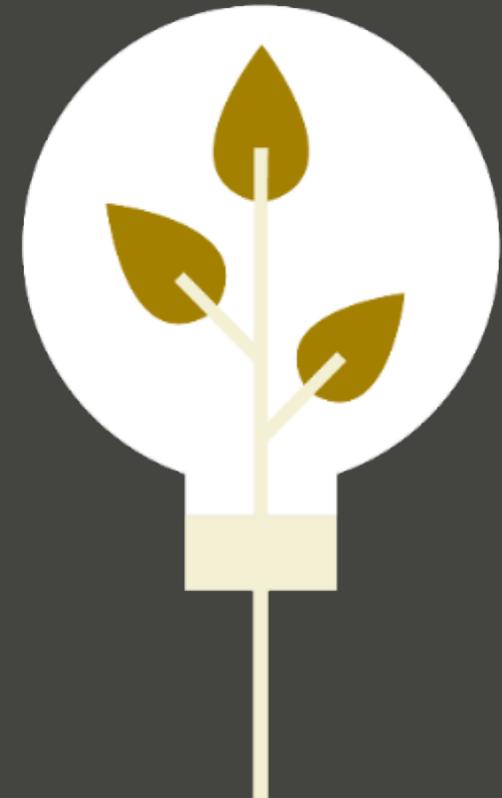
# Alternative Insights, Sustainability Insights & Venture Insights

All our asset management specialists feed into our briefings for the alternative asset management industry.

Alternative Insights and Sustainability Insights have over **4,000 regular readers** and, with so much acceleration in the venture and growth space, we've just launched Venture Insights.

Here's a taster of our most recent editions, but they're also recorded and so you can also find them wherever you get your podcasts.

- [Travers Smith's Sustainability Insights: The UK's cautious roll out](#)
- [Travers Smith's Alternative Insights: Unlocking private markets](#)
- [Travers Smith's Venture Insights: European fund domicile](#)
- [Travers Smith's Sustainability Insights: Sustainability reform lack a convincing theory of change](#)
- [Insights '26: What alternative asset managers should expect in 2026](#)



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