



Investing for a better future

Innovative financial solutions for investment professionals and their global clients.

→ Q2 2025

insigneo

Since 1985, our journey has been defined by **strategic mergers and acquisitions.**

1985

Foundation of Hencorp

For over three decades, the Hencorp Group has provided financial services to a global client base. Ranging from futures and securities brokerage, corporate finance, asset management, and private equity.

1990

Association with BNY Pershing

Initiates a strategic partnership that has lasted 35 years, focused on custody and technology solutions for the wealth management of international clients.

2017

Insigneo is Born

Global Investor Services acquires Northeast Securities and integrates more than 70 professionals managing \$3.2 billion in assets, becoming the largest independent platform for international clients.

2021

A Unique Opportunity Arises

Wells Fargo divests its financial advisor business, especially in the international wealth management sector. This decision meant that many advisors sought new opportunities at other firms.

2022

Acquisition of Citi's Businesses

Insigneo acquired Citi International Wealth Management Vehicles in 2022, incorporating \$4.5 billion in assets under management in Puerto Rico and Uruguay.

2023

Acquisition of PNC's Businesses

Insigneo acquired PNC's International Wealth Management Assets in 2023, expanding its presence in Latin America, especially in Mexico, by incorporating advisory and brokerage accounts from PNC Bank, with new offices in Texas.

We have been **helping investment professionals and their global clients** achieve their goals since 1985.

Insigneo arises from the integration of the values, culture, and collective growth of several companies – Global Investor Services, HB Asset Management, Alpha Capital, Hencorp Wealth Advisors, and Northeast Securities.



*Insigneo research approximately as of Q1 2025