

# 1. Client: Margaret Chen

## I. Professional Network:-

**Career Summary:** Experienced executive in the technology sector, previously serving in high-level financial roles.

**Company Description:** Formerly a CFO within the tech industry; background involves managing complex equity and corporate structures.

**Board Memberships:** Previously held board positions alongside other industry partners and legal experts.

## II. Network:-

### Close Professional Connections:

**1. Lisa Wong:** Former colleague and VP of Engineering at TechCorp (Connection Strength: 6/10).

**2. Michael Foster:** Partner at Foster & Associates; former board colleague (Connection Strength: 5/10).

**3. James Patterson:** Founder of Patterson Consulting; serves as the client's current business advisor (Connection Strength: 7/10).

### Potential Prospection Lead:

David Chen.

**Relationship Description:** Immediate family member (Brother) with a very high connection strength (9/10).

## III. Public Signals

**Event Suggesting Liquidity:** Sarah Mitchell (Professional Network) is preparing her company, BioTech Innovations, for an IPO in Q2 2026.

**Publicly Tracked Triggers:** Monitored events include startup sales e.g., David Chen's \$240M exit and international business expansions of Patterson Consulting.

**Tone:** Highly professional and Active, reflecting a high potential profile.

## IV. Prospection Card

**Name of Prospect:** David Chen.

**Why they matter:** Recently sold a startup for \$240M, creating an immediate need for liquidity management and tax-efficient strategies.

**Why now:** The liquidity event is recent; however, outreach is currently suspended because the primary relationship with Margaret Chen is at risk.

**Why consent is required:** Ethical guidelines and the strained state of the primary relationship require explicit permission or a warm introduction to avoid further damage to trust.

Name	Role	Relationship	Strength	Trigger Event
David Chen	CEO, Chen Ventures	Brother	9/10	Sold startup for \$240M
Lisa Wong	VP Engineering, TechCorp	Former Colleague	6/10	\$4M stock compensation package
James Patterson	Founder, Patterson Consulting	Client's Advisor	7/10	International expansion.
Michael Foster	Partner, Foster & Associates	Former Board Colleague	5/10	Law firm succession planning.
Sarah Mitchell	CFO, BioTech Innovations	Professional Network	4/10	IPO targeted for Q2 2026.

## 2. Client: Jean-Luc Moreau.

### I. Professional Network:-

**Career Summary:** A French national who has spent over three decades building a prominent logistics firm in Paris.

**Company Description:** Founder and majority shareholder of a mid-sized industrial logistics company based in Paris (16e arrondissement).

**Board Memberships:** Actively involved in French industrial trade associations and local logistical planning boards.

### II. Network Signals

#### Close Professional Connections:

**1. Adrien Lefebvre:** Long-time Operations Director at Jean-Luc's firm; manages day-to-day industrial logistics. (Connection Strength: 5/10).

**2. Elise Bertrand:** A peer in the logistics sector and fellow majority shareholder in a complementary shipping business. (Connection Strength: 8/10).

**3. Thierry Vasseur:** A senior consultant specializing in French industrial succession and family business transitions. (Connection Strength: 7/10).

#### Potential Prospection Lead:

François Dubois.

**Relationship Description:** A close business associate and former supplier to Jean-Luc's logistics company.

### III. Public Signals

**LinkedIn-Style Activity:** Maintains a reserved presence; occasionally shares articles regarding "Capital Preservation" and the future of French supply chains.

**Event Suggesting Change:** Recent industry mentions of a succession planning phase for his company, aligning with his desire for capital preservation.

**Tone:** Highly professional and discreet, reflecting his slightly conservative risk profile.

#### IV. Prospection Card

- **Name of Prospect:** François Dubois.
- **Why they matter:** Owns a growing equipment manufacturing firm and is seeking advice on long-term wealth preservation, matching Jean-Luc's own priorities.
- **Why now:** Dubois is currently facing a volatility anxiety similar to Jean-Luc's post-2022 market outlook.
- **Why consent is required:** Jean-Luc is highly anxious about market volatility and values discretion; he must personally vouch for the PWM to ensure the lead feels secure.

Name	Role	Relationship to Client	Strength	Trigger Event	Suggested Next Step
Thierry Vasseur	Senior Consultant , Vasseur & Co.	Business Associate / Former Supplier	8/10	Recently mentioned "volatility anxiety" regarding his own manufacturing firm.	Introduction call to discuss wealth preservation strategies.
Adrien Lefebvre	Operations Director, MLI	Professional "Right Hand"	9/10	Leading the day-to-day operations during Jean-Luc's succession phase.	Offer a session on executive financial planning and liquidity.
Elise Bertrand	CEO, Maritime Logistics	Industry Peer / Co-investor	7/10	Publicly seeking new shipping infrastructure investments.	Share market insights on logistics sector volatility.

<b>François Dubois</b>	Founder, Dubois Equipment	Close Business Associate	6/10	Currently seeking a new private bank for better personalized service.	Position as a specialized resource for business transition wealth management.
<b>Marc Moreau</b>	Junior Partner / Successor	Adult Son / Family	9/10	Preparing to take over a minority stake in the family business.	Succession planning workshop focused on tax-efficient wealth transfer.

### 3. Client: Alessandro Moretti

#### I. Professional Network:-

**Career Summary:** Alessandro is a high-profile luxury executive with over 25 years of experience in brand turnaround and global marketing. He currently serves as the Managing Director for a flagship leather goods "Maison" within a leading global luxury conglomerate.

**Company Description:** The Maison is a Tier-1 luxury brand known for heritage craftsmanship, generating over €2.1B in annual revenue with a heavy focus on the APAC and North American markets.

**Board Memberships:** Sits on the board of a Milan-based Fashion Tech incubator and is a frequent guest lecturer at Bocconi University on Luxury Brand Management.

#### II. Network Signals

##### Close Professional Connections:

**1.Elena Rossi:** Chief Marketing Officer and direct report who was recently promoted to the global executive committee, resulting in a significant salary and bonus increase. (Connection Strength: 8/10).

**2.Giulia Moretti:** Alessandro's sister, a prominent architect and designer currently opening a new flagship studio in New York requiring cross-border financial strategy. (Connection Strength: 9/10).

**3.Lorenzo Conti:** A VC Partner at Milano Tech and investment partner currently closing a new €100M fashion-tech fund. (Connection Strength: 5/10).

##### Potential Prospection Lead:

Marco Valenti.

**Relationship Description:** Marco is a strategic supplier and the founder of Valenti Artisans; his company is currently a high-value acquisition target for a major luxury conglomerate, presenting a significant pre-acquisition wealth structuring opportunity.

#### III. Public Signals

**LinkedIn-Style Activity:** Highly active in the "quiet luxury" discourse. Frequently posts about the intersection of sustainable craftsmanship and AI in retail.

**Public Mention:** Recently interviewed by *Vogue Business* regarding the digital transformation of heritage brands.

**Tone of Presence:** Polished, influential, and trend-focused. He positions himself as a "bridge" between traditional luxury and future tech.

## IV. Prospection Card

**Name of Prospect: Marco Valenti.**

**Why they matter:** As a key supplier to Alessandro's Maison, Valenti's company is a "hidden gem" in the supply chain. A potential €30M acquisition would create immediate liquidity.

**Why now:** Alessandro mentioned Valenti's stress regarding "selling the family legacy" during a recent interview

**Why consent is required:** The relationship is sensitive due to the "Client-Supplier" dynamic. Direct solicitation without Alessandro's blessing could be seen as an ethical breach and jeopardize Alessandro's corporate standing.

Name	Role	Relationship to Client	Strength	Trigger Event	Suggested Next Step
<b>Elena Rossi</b>	Chief Marketing Officer (CMO)	Direct Report / Close Peer	8/10	Recently promoted to global executive committee; significant salary/bonus hike.	Educational invite: "Managing Executive Windfalls" webinar.
<b>Marco Valenti</b>	Founder, Valenti Artisans	Strategic Supplier	7/10	Company is being courted for acquisition by a major luxury group.	Pre-acquisition wealth structuring consultation.
<b>Giulia Moretti</b>	Architect / Designer	Sister	9/10	Opening a new flagship studio in New York; needs	Warm intro call regarding international wealth transfer.

				cross-border tax advice.	
<b>Lorenzo Conti</b>	VC Partner, Milano Tech	Investment Partner	5/10	Closing a new €100M fashion-tech fund.	Share thought leadership on Alternative Assets and Private Equity.