

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.

François Dubois	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.
Marc Moreau	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
Elena Rossi	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.
Marco Valenti	Founder, Valenti Artisans	Strategic Supplier	7/10	Company is being courted for acquisition by a major luxury group.	Pre-acquisition wealth structuring consultation.
Giulia Moretti	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.	
Lorenzo Conti	VC Partner, Milano Tech	Investment Partner	5/10	Closing a new €100M fashion-tech fund.	Share thought leadership on Alternative Assets and Private Equity.