



Investment Management and Funds

Whether you are an asset manager, a fund sponsor or an investor, our cross-border multi-disciplinary investment management and funds team is well positioned to advise you with respect to your investment activities across the entire value chain, from strategic planning and launch through liquidation.

We have one of the largest investment management and funds practices in the world, with more than 250 lawyers with relevant experience and 40 offices in all key global jurisdictions. Our global network enables us to design and deliver unique end-to-end integrated, cohesive and consistent value services to asset managers and fund sponsors worldwide. Our client roster includes investment firms, banks and insurers, alternative and UCITS investment managers, real estate managers and operators, hedge funds, private equity groups and venture capital firms forming investment funds of all types, including private equity, real estate, infrastructure, energy, funds of funds, secondary, venture capital, hedge and debt funds. Our investment management and funds lawyers also represent many of the world's leading private and institutional investors in thousands of domestic and foreign fund investments annually.

By working with both leading general and limited partners, we know ahead of time what various parties expect. Performance-driven and focused, we understand your need to achieve the right financial returns, to anticipate upcoming market trends and to act responsibly. Our investment management and funds lawyers are multi-lingual, culturally sensitive and never lose sight of your commercial objectives. They aim to deliver tailor-made and inductive advice covering:

- The full investment fund lifecycle: from strategic planning and launch to liquidation
- The entire investment fund value chain: from investor to investment level
- All relevant areas of experience: tax, regulatory, corporate governance, M&A, fund financing, structured finance, fund distribution, employment, restructuring, trademarks, data protection, and disputes resolution
- The implementation of environmental, social and governance (ESG) policies for investment management players: from their design and implementation goals in sponsors' investment processes, due diligence, reporting, disclosure and regulatory compliance.

CAPABILITIES

- #1 Global M&A deal volume for the last 12 years (*Mergermarket* 2010–2021)
- #1 Global Renewables legal adviser by deal count, *Inspiratia*, H1 2021
- #1 Global Infrastructure legal adviser by deal count, *Inspiratia*, H1 2021
- #1 global renewable energy legal advisor 2021 by deal count, *Inspiratia* Q1-Q3 2021
- Firm of the Year: Projects, Energy and Natural Resources, *The Legal 500 Awards* 2020

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- Corporate
- Employment
- Global Investment Funds
- Private Equity
- Real Estate
- Real Estate Funds and Private Equity
- Real Estate Investment Trusts
- Sustainability and

- Firm of the Year: Projects, Energy and Natural Resources, *The Legal 500 Awards 2020*
- Law Firm of the Year in Real Estate for 17 consecutive years (*International Who's Who of Business Lawyers 2021*)
- Most Innovative Law Firm, FT Innovative Lawyers Europe Awards 2021
- #1 Europe Private Equity – Buyouts, *Mergermarket*, 2018–2020
- #1 Europe Private Equity – Exits, *Mergermarket*, 2018–2020
- #1 Most active law firm in Europe private equity deals, *Pitchbook*, 2018–2020
- Band 1, Investment Funds: Investor Representation, UK-wide, *Chambers and Partners UK*, 2022
- #1 Most active law firm in Europe private equity deals, *Pitchbook*, 2018–2020
- Band 4, Private Equity Fund Formation – *Chambers USA 2021* and *Chambers Global 2022*
- Band 1, Investment Funds: Investor Representation – *Chambers USA 2021* and *Chambers Global 2022*
- Band 3, Real Estate Investment Trusts – *Chambers USA 2021*
- Band 4, Private Equity Funds (Including Venture Capital) – *The Legal 500 2021*

Environmental, Social and Governance

- Tax

RELATED SECTORS

- Energy and Natural Resources
- Financial Services
- Infrastructure, Construction and Transport
- Insurance
- Real Estate

INSIGHTS

Publications

Private equity and hedge funds in Puerto Rico – key tax considerations

9 May 2022

An outline of the requirements that must be complied with under Act 60 in order for private funds and their sponsors and investors to qualify for certain Puerto Rico tax benefits.

Integration of sustainability factors under the UCITS, AIFMD, IDD II and MIFID II regulations

29 July 2021

Responsible investment is largely seen as the inclusion of environmental, social and governance (ESG) factors in investment and decision-making processes. This concept has developed over time, and more specifically post 2008.

Cross-border distribution of Alternative Investment Funds – What you need to know about the new regulatory framework

15 July 2021

A number of key provisions of the new legislative framework on cross border distribution of investment funds across the European Union will become applicable as of 2 August 2021.

Imminence does not mean haste

4 March 2020

EU SUSTAINABLE FINANCE

Sustainability and ESG stewardship are at the forefront of investment managers' and investment funds' agendas under the combined pressure of investors and as a result of several important pieces of regulation becoming live. SFDR is one of them. It will become applicable in phases, the first deadline being as early as 10 March 2021.

Launching a Real Estate Fund: Key Strategies, Structures and Terms (Part One) and Important Tax, Regulatory and Securities Law Considerations (Part Two)

29 May 2020

Key features of real estate funds and considerations for fund managers considering pursuing the strategy anew.

Events

Previous

Hear GP and LP perspectives on fundraising for emerging managers

19 October 2021 | 1:00 pm - 2:00 pm ET

Webinar

The Irish ILP and what it means for US GPs

24 June 2021 | 11:00 EST

Webinar

NEWS

DLA Piper launches global, dedicated end-to-end Investment Management and Funds practice

11 November 2021

DLA Piper today announces the launch of a global, dedicated end-to-end Investment Management and Funds practice offering to support the entire investment management and investment funds value chain.

DLA Piper advises Macquarie Asset Management in establishment of a road infrastructure investment fund with Odinsa

7 September 2021

DLA Piper Martinez Beltran represented Macquarie Asset Management in the establishment of a strategic alliance between Macquarie Infrastructure Partners V, an infrastructure fund managed by Macquarie Asset Management, and Odinsa, the road and airport concession subsidiary of Grupo Argos, for the creation of an investment platform that will manage Odinsa's current road assets in Colombia with a consolidated valuation of US\$1.15 billion.

DLA Piper advises Manulife on its acquisition of 39 Martin Place

29 January 2021

DLA Piper has advised international financial services group Manulife Financial Corporation on its 50/50 joint venture with Investa Commercial Property Fund ("ICPF") to acquire the right to a 100% interest in 39 Martin Place, Sydney from Macquarie Group Limited (ASX: MQG).
