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Julie Sosne

Vice President

PROFESSIONAL SUMMARY

Julie Sosne is a Vice President at The Areté Group, engaged in both sponsor and fiduciary activities. Julie brings over nine years of international investment banking and consulting experience from top-tier firms. Julie has proven leadership skills, managed high-performing teams, and executed significant M&A transactions for large institutional clients. With a critical thinking mindset, Julie's expertise in investment analysis, financial modeling, and strategic advisory has delivered successful results for clients throughout her career.

Before joining Areté, Julie was a pivotal member of the FIG M&A team at Evercore in New York and London. During her tenure she excelled in various roles, starting as an intern and rising to a Senior Associate. Her responsibilities included advising on global transactions, leading teams, and contributing to new client mandates. Through her experience at Evercore, Julie honed comprehensive skills in financial analysis, deal strategy, and client management.

Prior to Evercore, Julie graduated from ESCP Europe Business School with an Advanced MS in Finance, achieving First-Class Honors. She also holds an MS in Strategy and International Management and a BS in Economics and Management from the University of Paris I Pantheon-Sorbonne.

Outside of her professional endeavors, Julie is multilingual and enjoys various activities. She is fluent in French and English, and proficient in Creole and Spanish. Her interests include combat sports, cycling, skiing, and mountain hiking. Julie's diverse interests and experiences contribute to her dynamic personality and unique perspective.

PROFESSIONAL BIOGRAPHY

CAREER EXPERIENCE

ARETÉ HOLDINGS, LLC / THE ARETÉ GROUP — **New York, NY**
VICE PRESIDENT — 1/24 – Current

EVERCORE — **New York, NY / London, UK**
SENIOR ASSOCIATE — 7/16 – 7/23

ACCENTURE — **Paris, FR**
JUNIOR CONSULTANT — 1/14 – 9/14

SELECT TRANSACTION EXPERIENCE

WESTLAND / ONTARIO TEACHERS – Advised Westland Insurance Group on its capital partnership with the Ontario Teachers' Pension Plan

ALACRITY / BLACKROCK – Advised Alacrity on the sale of a majority stake to BlackRock

DISTINGUISHED / AQUILINE – Advised Distinguished Group on its sale to Aquiline Capital Partners

BLACKSTONE / WESTLAND – Advised Blackstone Credit on its ~C$1.2bn investment in Westland Insurance Group

ATTUNE / COALITION – Advised Attune Holdings on its sale to Coalition

STACKHOUSE POLAND / ARTHUR J GALLAGHER – Advised Stackhouse Poland Group on its sale to Arthur J Gallagher & Co

INTEGRO / EPIC – Advised Integro on the sale of its U.S. operations to EPIC Holdings

TYSERS / INTEGRO – Advised Hawkes Bay Holdings on its sale of Tysers to Integro

ENSTAR / KAYLARE – Advised Enstar on its $400m acquisition of a further 52% stake in KaylaRe

NOVAE / AXIS – Advised Novae Group on its £478m sale to AXIS Capital

ASR & NN / UNILEVER – Advised ASR and NN on the €450m sale of their preference shares in Unilever N.V. to Unilever PLC

LIVERPOOL VICTORIA / ALLIANZ – Advised Liverpool Victoria Friendly Society on the £1bn sale of its UK general insurance business (LVGIG) to Allianz

STRUTT & PARKER / BNP PARIBAS – Advised Strutt & Parker on its merger with the UK business of BNP Paribas Real Estate

GURNET POINT / INNOCOLL – Advised Gurnet Point Capital on its $209m acquisition of Innocoll Holdings

EDUCATION/CERTIFICATIONS

ESCP EUROPE BUSINESS SCHOOL – *Paris, FR / London, UK*
Advanced MS in Finance, First-Class Honors

UNIVERSITY OF PARIS I PANTHEON-SORBONNE – *Paris, FR*
MS in Strategy and International Management, First-Class Honors
BS in Economics and Management, Major in Finance, Honors

* References Available Upon Request *