


# Cooper Investors fast-tracks \$400m raising for its Family and Founder Global fund

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**EXCLUSIVE**

By **DAMON KITNEY**, VICTORIAN BUSINESS EDITOR

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Cooper Investors has brought forward the reopening of its Family and Founder global fund after receiving commitments from wealthy clients for more than 80 per cent of the \$400m capital raising.

The \$100m Family and Founder global fund, which invests in founder and family-led firms across the world, initially revealed plans last October to raise [\\$300m](#) in fresh capital.

This was later upscaled to \$400m due to strong demand, and the raising was due to commence in March. But this was brought forward to February 1.

“We have had an overwhelming response from investors (currently over 75% of the available capacity is already committed) along with many requests from investors to have the opportunity to place their investment before 1 March 2021,” Cooper Investors said in a note to clients.

“Considering the volume of applications that we will need to process, we have taken the decision to bring forward the opening date of the fund so as to meet our investors preferences and to allow the timely processing of the application paperwork.”

Cooper Investors, founded by investment legend Peter Cooper, will be talking to potential clients in Western Australia, South Australia and Queensland this week about the raising after firms including PwC Private Wealth Services, the David Evans-chaired Evans & Partners, the Baillieu family’s Mutual Trust, Hamilton Wealth Partners, and the Perth-based Entrust Wealth Management subscribed to the offering.

Since inception the Family and Founder portfolio, which is overseen by Cooper Investors’ global equities portfolio manager Allan Goldstein and deputy portfolio manager Marcus Guzzardi, has delivered investors double-digit returns.

The launch of the Family and Founder fund in 2019 reflected Peter Cooper's long-held belief that portfolio investing in founder-led, family-linked or employee-owned companies will deliver performance over the long term.

This means having average insider ownership of at least 20 per cent and an average management tenure or family involvement of 40 years or more.

There are 20 stocks in the Family and Founder fund. Seventy per cent of the long-only portfolio is invested in companies with market values below \$30bn.

Cooper Investors, which has \$12bn in assets under management around the world, launched the Family and Founder fund in July 2019 with an initial \$100m injection, funded by the firms' staff and some key high-net-worth backers to prove up the investment strategy.

Half the firm's flagship [Brunswick Fund](#), started by Mr Cooper nearly two decades ago, is invested in family or founder-linked companies, both domestic and global.

**DAMON KITNEY, VICTORIAN BUSINESS EDITOR**

Damon Kitney has spent two decades in financial journalism, including 16 years at The Australian Financial Review in a variety of writing and editing roles in Sydney, Melbourne, Canberra and Perth, including 5 ... [Read more](#)

