

Andrey Narutskiy • CEO at Leon MFO Investments

Inside the World of Modern Wealth Management

Interview with Andrey Narutskiy, CEO at Leon MFO Investments: Our primary goal is to provide high-quality services that cover all aspects of our clients' financial lives

Family offices and wealth managers have traditionally been seen as exclusive, complex entities. How is your firm making its services more accessible and understandable for clients?

Our primary goal is to provide high-quality services that cover all aspects of our clients' financial lives—from managing investments and tax planning to succession strategies and asset protection. But beyond delivering these services, we believe it is crucial for our clients to truly understand what we do and feel actively involved in the process.

To achieve this, we focus on three key areas:

1. Simplifying complex financial concepts through clear, easy-to-understand products.

2. Enhancing our ability to explain investment, tax, and succession planning in straightforward terms.

3. Educating clients through events, webinars, and thought leadership.

We have developed several innovative tools that have received positive feedback from clients, such as:

► **A comprehensive source of wealth report** to streamline compliance and documentation.

► **A succession roadmap** outlining the steps a successor needs to take when inheriting assets.

► **A tax comparison table** that helps clients assess their current tax obligations and the implications of relocating to another jurisdiction.

By offering these resources, we empower clients with knowledge, ensuring they feel confident about their financial decisions.

Technology is transforming

the wealth management space. How have you integrated digital solutions to enhance client service?

Confidentiality and ease of access are two pillars of our digital strategy. We have invested heavily in secure infrastructure to make communication with clients seamless while safeguarding their sensitive information.

One of our most significant innovations is a **secure client data room** based on cloud technology. This allows clients to:

- Access important documents from any device with a secure login.
- Exchange files and communicate with our team in a structured, protected environment.

We believe that exceptional service starts with having the right team in place. Over the past couple of years, we have made strategic hires, all with strong backgrounds in wealth management, law and compliance.

These additions have allowed us to:

- Improve efficiency by distributing tasks among specialized team members.
- Ensure faster turnaround times without compromising quality.
- Maintain 24/7 client contact and provide proactive updates.

We have also implemented a structured **client communication process**, which includes:

- **Bi-weekly status reports** to keep

Recognized by Euromoney for “Best Family Office Services” and “Best Succession Planning” in Cyprus, the firm continues to set new benchmarks in wealth management through innovation and client-centric service.

► Store all critical financial information on their own servers, ensuring third-party access is minimized.

Additionally, we have integrated a **private messenger** within this system, providing a completely secure way for clients to communicate with us-free from the risks of public servers.

These tools not only enhance security but also improve the overall client experience by making information retrieval and communication faster and more efficient.

Client service is at the heart of any successful wealth manager. What steps have you taken to enhance service quality and responsiveness?

Given that our clients have assets



Andrey Narutskiy CEO, Executive Director



Andrey Narutskiy CEO, Executive Director,
Demetris Nicolaou Executive Director, Head of Risk Management

and business interests across multiple countries, having a strong international network is essential.

We have been actively developing relationships with **top-tier service providers, banks, and consultants in key jurisdictions**. Our approach is highly meticulous - we don't just recommend partners; we conduct a rigorous selection process, which includes:

- Researching service providers based on industry ratings.
- Performing background checks and seeking referrals.
- Running **competitive tenders** so clients can compare service options and make informed choices.

This ensures that wherever our clients are located, they have access to the

best legal, tax, and financial expertise available.

Leon MFO Investments has been expanding its offerings to reach a broader investor base. Can you tell us about any new funds or strategies you have introduced in recent years?

Three years ago, we launched two new funds built on the success of two of our existing discretionary portfolio strategies. The idea was to enable a wider range of investors to access these proven strategies.

These funds are **Leon Income Fund RAIF** and **Leon Global Hedge Fund RAIF**. They are addressed to professional and well-informed investors. Investors can make a direct subscription or invest

Wealth management is evolving rapidly, integrating technology and innovative strategies to better serve clients. We sat down with Andrey Narutskiy, CEO at Leon MFO Investments, to discuss how their firm is setting new standards in wealth management, investment strategies, and client service.

in these funds through fund platforms and financial institutions, such as private banks and investment advisors.

Your firm has been actively involved in investor education and market engagement. Can you share some key initiatives?

A: We believe that knowledge sharing is essential for both our clients and the wider market. That is why we regularly organize and participate in events that foster discussions on investment strategies, financial literacy, and family governance.

During our recent **Annual Event at the Four Seasons**, we hosted an interactive poll where participants predicted future trends for various indices, commodities, interest rates, inflation, and currencies. At the end of the year, those with the most accurate forecasts will be recognized as winners.

In addition to events, we also contribute regularly to publications such as Forbes, Insider, Philenews, other Newsletters and LinkedIn, ensuring that our market insights reach a broader audience.

We also participate actively in events organized by CIFA, to promote Cyprus as a funds jurisdiction and to inform investors of the advantages of funds with respect to investor protection, diversification and professional management.

Congratulations on your recent wins



Leon MFO Investments simplifies complex financial concepts and empowers clients with practical tools, events, and educational resources to promote understanding and confidence.

at the Euromoney Private Banking Awards! What do these recognitions mean for Leon MFO Investments?

Thank you! We are incredibly honored to be recognized by Euromoney, a global authority in private banking and wealth management. This year we have won two awards: **"Best for Family Office Services – Cyprus"** and **"Best for Succession Planning – Cyprus"** reaffirming the dedication and expertise of our team.

These awards prove our commitment

to providing world-class multi-generational wealth management and bespoke family office solutions. More importantly, they reflect the trust our clients place in us - something we deeply value.

Our goal is to set **new benchmarks in family office services** - ensuring that our clients receive the best possible support in an ever-changing financial landscape. **Looking ahead, what's next for your firm?**

Our focus remains on **innovation, education, and service excellence**. We are constantly refining our offerings to meet the evolving needs of our clients. In the coming year, we plan to:

- **Expand our digital infrastructure**, adding new tools for client engagement and security.
- Continue growing our **global network** to provide even more comprehensive cross-border solutions.
- Enhance our **market education initiatives**, with more articles, events, and expert insights.
- Ultimately, we want to **set a new standard for family office and wealth management services** - one that combines deep expertise with cutting-edge technology and a truly client-centric approach.