

OpenWealth (CaixaBank Group) surpasses €10 billion under supervision and consolidates its leadership in the management of UHNW and family offices in Spain

- **The CaixaBank subsidiary specializing in independent wealth consultancy for ultra-high-net-worth clients and family offices has reached its supervised assets target three months ahead of schedule.**
- **The largest multifamily office in Spain has also grown in client numbers, reaching 60—exceeding the goal of 50 set for year-end.**
- **Under the leadership of Marta Alonso, who marks her first year as CEO, OpenWealth has strengthened its team with leading specialists and enhanced its network of collaboration with key sector players and its advisory board of internationally renowned experts.**

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OpenWealth, the CaixaBank subsidiary dedicated to providing independent wealth consultancy services for ultra-high-net-worth clients and family offices, has exceeded its targets for the end of 2025 in both supervised assets and client numbers, thus consolidating its leadership in the management of large fortunes and family offices in Spain.

The company reached €10 billion under supervision in October 2025, surpassing the set target three months ahead of schedule. As of the end of November 2025, the company manages €10.667 billion under supervision (a 37% increase over the previous year). Regarding clients, the base grew to 60 in November 2025, representing a 26% increase over the last twelve months. In this case, the established goal of 50 clients was exceeded fifteen months in advance, reaffirming OpenWealth's ability to attract and retain clients in the large fortunes segment.

Thus, the CaixaBank subsidiary is reinforced not only as the largest wealth consultancy for ultra-high-net-worth clients (UHNW) but also as the largest multifamily office service in Spain.

Marta Alonso, OpenWealth CEO, highlights: "OpenWealth's growth reflects a strategic vision and a truly independent and distinctive value proposition, based on anticipating our clients' needs. Looking ahead, we want to continue driving innovation and collaboration with the global family office ecosystem, consolidating OpenWealth as an undisputed benchmark."

Commitment to specialization and talent

Under the leadership of Marta Alonso, who marks her first year as general manager, OpenWealth has enhanced its network of collaboration with key sector players and its advisory board of internationally renowned experts, and has strengthened its team with leading specialists.

OpenWealth has expanded its team by incorporating new consultants from other divisions of the Group, bringing greater expertise in asset management and personalized solutions for large fortunes. The company also has specialists in real estate, infrastructure, listed markets, and private markets, demonstrating its commitment to excellence and personalized attention. Key areas such as family governance, training, and philanthropy have also been consolidated to adapt to the complex needs of its clients, anticipate trends, and offer a comprehensive and distinctive service in the sector.

As of the end of November 2025, OpenWealth has nine consultants and six specialists, reaching 23 employees—a 28% increase compared to 2024.

Collaboration with the family office ecosystem in Spain

Additionally, to enhance its value proposition and market knowledge, OpenWealth has continued to strengthen collaboration networks with key sector players and its advisory board, composed of independent experts with diverse profiles and international prestige.

The advisory board, created in June 2024, includes professionals such as Inés Andrade, partner at AltamarCAM Partners; Juan Béjar, co-founder and president of Bruc Management Projects; Juan Gandarias, president of CaixaBank Asset Management and CaixaBank Wealth Management Luxembourg; Blanca Hernández, founder and CEO of Magallanes Value Investors; Carlos Nueno, head of international business at TeladocHealth; José María Ortiz, vice-rector for development at Universidad de Nebrija; and Fernando Ruiz, president of Fundación Seres, among others.

In recent months, the board has become a key ally for OpenWealth, acting as a catalyst for innovation and rigor in strengthening market knowledge and expertise, both in Spain and abroad. The latest meeting took place last November.

In the academic and training world, in May 2025, OpenWealth presented the study '[Discovering the Spanish family office](#)', prepared together with finReg360, Spain's leading firm in regulation, consultancy, and financial taxation. The study, based on interviews with 40 family groups during 2024, offers an updated view of family offices in Spain, analyzing their organizational and governance models, investment structures, and main challenges.

In July 2025, OpenWealth, together with IE University and Franklin Templeton, launched the [IE Family Offices Knowledge Hub](#), a space for knowledge generation and debate around family offices. The initiative, driven by the IE Center for Families in Business, was created to become a reference space dedicated to the creation and dissemination of knowledge about family offices. Its agenda includes applied research, strategic meetings, content generation, and training programs designed for decision-makers in complex wealth environments.

As a result of this collaboration, Marta Alonso, OpenWealth CEO, and Miguel Rubio, financial investment specialist at OpenWealth, participated in October in the Entrepreneurial Family Office

Programme 2025 at IE Business School, to analyze the management of liquid assets and their alignment with the objectives of business families.

A holistic and independent service

OpenWealth (CaixaBank Group) was born as a holistic service from an independent entity focused on the major issues affecting business families, including governance, family vision, strategic planning, education of new generations, succession, and analysis of investment opportunities. Additionally, OpenWealth offers risk and cost control services, family office/investment organization, and a technological platform for wealth consolidation.

The combination of independence, flexibility, and its belonging to Spain's leading financial group allows OpenWealth to offer innovative and exclusive solutions, integrating national and international providers and covering all client needs, from strategic asset allocation to the search for global opportunities.

CaixaBank was the first bank in Europe to launch this service, with a unique value proposition in the market, 100% independent and with explicit fees, offered to individuals with assets exceeding €50 million, regardless of whether they are clients of the entity and where their assets are deposited, which may be in different entities.

The success of this service has resulted in CaixaBank being recognized as 'Best Private Bank for Family Office Services in Spain' for two consecutive years (2024 and 2025) at the Global Private Banking Awards by British magazine Euromoney. Additionally, Citywire Spain has recognized Marta Alonso as Personality of the Year 2025 in its annual Private Banking Awards.