DEALS AND SUITS

Conquest Planning Inc. completes US$80 million series B funding round

On June 23, 2025, Conquest Planning Inc., (Conquest), a technology platform modernizing financial planning with customized and convenient advice, announced it has raised US$80 million (C$110 million) in Series B funding led by Growth Equity at Goldman Sachs Alternatives. The round attracted additional new investors, including Canapi Ventures, a venture capital firm investing in early to growth-stage software and fintech companies, as well as BDC Capital, Citi Ventures, TIAA Ventures and USAA. Existing investors BNY and Portage also participated in the round, which brings Conquest's total funding to over US$100 million.

Conquest was established in 2018 with the foundational belief that financial planning should be accessible, yet bespoke, for retail investors and ultra-high-net-worth families alike. Its artificial intelligence (AI)-powered software enables financial advisors, banks, brokerages, wirehouses, insurance firms and pension providers to offer personalized advice at scale.

BLG represented BDC Capital led by Manoj Pundit.

BLG Team : Manoj Pundit