

TDS Lawyers Advise Conquest Planning on \$110 Million Investment Raise

published 09/26/2025

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Thompson Dorfman Sweatman LLP advised Winnipeg-based Conquest Planning Inc. on its \$110 million Series B investment round, led by Growth Equity at Goldman Sachs Alternatives, with participation from Canapi Ventures, BDC Capital, Citi Ventures, TIAA Ventures, and USAA. The investment will support Conquest's continued growth and expansion across North America.



TDS Role and Team

TDS' Corporate and Securities lawyers provided strategic legal advice throughout the financing, leveraging the firm's experience in venture capital, private equity, technology transactions, and cross-border financings. The team included Leilani Kagan, Christina Vieira Olfert, Celyna Yu, Leah Suderman, and Noah Soenen, with articling student support from Abhinav Dhingra.

About Conquest Planning

Founded in 2018, Conquest Planning is a financial technology platform that modernizes financial planning, enabling advisors and financial institutions to deliver customized, efficient, and accessible wealth management solutions. The company's technology addresses the growing demand for innovative, technology-driven financial services in Canada and internationally.

Supporting Growth and Innovation

TDS regularly advises emerging and growth-stage companies on financings, investments, and strategic transactions, helping clients scale, innovate, and compete globally.

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