

**For immediate release**

**4 February 2015**

**BORDIER (UK) SECURE RARE TRIPLE**

**Independent research agency Defaqto award Bordier (UK) maximum 5 Star rating  
for trio of multiple discretionary propositions**

Specialist asset management firm Bordier (UK), (formerly Berry Asset Management PLC), is delighted to confirm that it has retained the maximum 5 Star Rating for multiple discretionary propositions – a rare feat - across all three of independent research agency Defaqto's Discretionary Fund Management rating classes. The announcement comes in the wake of its 2015 DFM audits, which Defaqto says represent "the most intensive sets of standardised screening that it has conducted on the DFM market" yet.

Bordier (UK) has been awarded the maximum 5 Star Rating for the following services:

- 'MPS Platform': the Bordier (UK) Platform Managed Portfolio Service, which offers cost-effective management of portfolios on a variety of platforms, via advisers, with a value of £1,000 plus
- 'MPS - Direct Custody': the Bordier (UK) Managed Portfolio Service, which offers cost-effective management of portfolios with a value of £20,000 plus
- 'Bespoke - Wealth Management Service': the Bordier (UK) Wealth Management Service, which offers a bespoke discretionary portfolio management service for portfolios with a value of £250,000 plus

Commenting on the retention of its ratings, Bordier (UK) Chief Executive Officer, Jamie MacLeod said, "The wealth management industry continues to attract new entrants and is becoming ever more overcrowded; that makes the task of identifying the right investment partner much harder than it should be. At Bordier (UK) we have opened ourselves up to companies like Defaqto, ARC and Distribution Technology, and we continue to make significant efforts to make the intermediary's task in selecting the right partner a little easier.

## **BORDIER (UK) SECURE RARE TRIPLE../2**

"We subscribe our investment performance data to ARC, the firm's Suggestus service providing an impartial view of investment managers. As it is backed up by hard data, this is proving to be an invaluable tool for intermediaries in the manager selection process. We took the decision to subscribe our investment data to ARC in 2012, in the spirit of transparency, and have subsequently been awarded the coveted ARC 'Approved Due Diligence Kitemark'. IFAs say they are delighted with what we are doing; our investment performance (as judged by ARC) was again outstanding and the retention of our trio of Defaqto 5 Star ratings now further underlines the credibility of the Bordier (UK) proposition."

"Our clients have benefited from our service offering and we continue to innovate and expand our suite of services to meet their evolving requirements. We remain differentiated by the quality of our people and the long-term partnerships which exist across our team, and we look to the future with great hope, one of a small number of firms truly committed to setting new standards."

For further information on the Bordier (UK) suite of wealth management services, advisers should contact Client Services at Bordier (UK) on 020 7667 6600, email [client.services@bordieruk.com](mailto:client.services@bordieruk.com) or visit [www.bordieruk.com](http://www.bordieruk.com).

**- ENDS -**

**Journalists seeking further information should contact:**

Gordon Puckey  
Managing Director  
Phoenix Financial PR  
07799 767 468  
[gordon@phoenixfinancialpr.co.uk](mailto:gordon@phoenixfinancialpr.co.uk)

## **BORDIER (UK) SECURE RARE TRIPLE../3**

### **NOTES TO EDITORS**

#### **1. An independent view on Bordier (UK) from ARC**

"The name may be new to some, but Bordier (UK) is the product of a long relationship between a contemporary British boutique and a grand old Swiss bank. While an understated approach is common to both the British and the Swiss characters, Bordier (UK) manages to differentiate itself through a combination of the best elements of European and British private client investment management: an assured, yet uncomplicated investment solution; clear and transparent communications in all languages - performance, fees or investment thinking; with an objective to enhance performance through both operational efficiency but also hard work and investment savvy."

"Most importantly, Bordier (UK) has a GBP performance history to support the lineage of its namesake."

*Chris Curtis, Investment Analyst, Asset Risk Consultants (ARC)*

#### **2. About Bordier (UK)**

Bordier (UK), which is a subsidiary of the Bordier Group, can trace its roots in the UK wealth management industry back as far as 1981 and the formation of Berry Asset Management PLC; it has been trading under the Bordier (UK) banner since September 2014. The relationship with the Bordier Group, an independent and international private banking group headquartered in Geneva began in 2001, when a strategic alliance was formed through the Group's acquisition of a stake-holding in Berry.

Bordier (UK) is independently managed, under the leadership of Chief Executive Officer Jamie MacLeod, and is based in St James's, at the heart of London's wealth management district.

Bordier (UK) has a single focus, the provision of wealth management services for UK, international and resident non-domiciled clients - private clients, trustees, personal pensions, charities and City livery companies included - the range of services available to clients becoming ever broader over the years as the relationship has grown closer. Amongst its distinguishing features Bordier (UK):

## **BORDIER (UK) SECURE RARE TRIPLE../4**

- concentrates solely on investment management
- has no in house products to sell
- has a clear, competitive and completely transparent pricing structure
- submits portfolio performance data to Asset Risk Consultants (ARC)
- has its principals' money invested alongside that of its clients

The firm has been recognised for the quality of its service, levels of client satisfaction, outstanding risk-adjusted investment performance over the longer term, and innovations, with a number of awards from leading industry organisations over the years; it has won or been shortlisted for 23 prestigious industry awards since the beginning of 2013.

<http://www.bordieruk.com>

### **3. About Bordier & Cie**

Established in 1844, Bordier & Cie is owned and managed by the descendants of the founding families, the Partners having unlimited personal liability for all the transactions entered into by the Bank. The status of Partner is handed down from generation to generation to safeguard the permanence of the business. This distinctive aspect, together with its financial solidity, allows the Bank to focus clearly on its clients' long-term goals, rather than on the short-term targets of outside shareholders. The Bank:

- manages AUM in excess of £7.0bn (as of 31 December 2014), circa CHF 10.6bn;
- employs circa 225 staff globally, 35 of whom work in the UK company, in private banking and asset management services, and
- has offices in Bern, Geneva, London, Montevideo, Nyon, Paris, Singapore, the Turks & Caicos Islands and Zurich

This document is issued and approved by Bordier & Cie (UK) PLC (of 23 King Street, St James's, London SW1Y 6QY), which is authorised and regulated by the Financial Conduct Authority, 25 The North Colonnade, Canary Wharf, London, E14 5HS. Incorporated in England No. 1583393.