

For immediate release

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BORDIER UK STRATEGIES NOW AVAILABLE ON 7IM PLATFORM

Specialist investment management firm Bordier UK confirmed today the addition of the five core investment strategies available through its 'Platform Managed Portfolio Service' – Defensive, Cautious, Balanced, Growth and Adventurous – to the Seven Investment Management (7IM) platform. The initiative enables intermediaries to tap a wealth of investment experience and offers a high quality, cost-effective means of managing client assets, with minimum investments from £1,000 lump sum and £100 per month. The strategies, which were recently made available via a strategic partnership with Novia Global, can also be accessed via Ascentric, Aviva, Fusion, Novia, Nucleus, Praemium, Standard Life, Transact and Zurich.

Bordier UK Chief Executive Officer, Jamie MacLeod, is delighted that the firm has been able to extend access to its top-performing strategies with 7IM, which he said offers an excellent fit given the firm's investment experience and expertise. "We have openly invited the scrutiny of organisations like ARC, Distribution Technology and Defaqto in recent years in the spirit of transparency, and as part of our drive to make the intermediary's task in selecting the right partner that much easier.

"What is more, our investment performance has again been outstanding in 2016 – with all our core investment strategies producing positive returns – and this has underlined our proven track record for outstanding risk-adjusted performance over the longer term. The retention of our trio of Defaqto 5 Star Ratings for a third consecutive year further confirms the credibility of our investment proposition. We are very pleased indeed that we have been able to extend access to our range of strategies to intermediaries working off the 7IM platform. We look forward to building an enduring partnership with the platform team at 7IM."

Verona Smith, Head of Platform at 7IM, an award-winning platform provider among its other activities said, "As advisers evolve their business models – in a drive to embrace regulatory change and the on-going demand for technology-led solutions – platforms will play an increasingly important role. We are delighted that Bordier UK has chosen to distribute its risk rated strategies via our platform and pleased that this latest collaboration further extends the advisers' choice of investment solutions for their clients."

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 or visit www.bordieruk.com.

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NOTES TO EDITORS

1. About 7IM

With £11bn in assets under management and operational since 2002, 7IM provides investment services to professional wealth managers, planners and advisers. These include:

- An investment and open architecture trading platform;
- Discretionary investment management with advice;
- A range of multi-asset portfolios;
- A developed range of banking services;
- A fantastic app, 7IMagine, to bring clients' portfolios to life

2. About the Bordier UK Platform Managed Portfolio Service (PMPS)

- **PMPS Defensive.** Objective: to preserve capital in real (inflation-adjusted) terms over the medium to longer term. The strategy is managed with a maximum target of 20% invested in global equity markets at any given time.
- **PMPS Cautious.** Objective: to assist investors looking to preserve their capital in real (inflation-adjusted) terms over the medium to longer term. The strategy is managed with a moderate attitude towards risk with a maximum target of 40% invested in global equity markets at any given time.
- **PMPS Balanced.** Objective: to build capital in real (inflation-adjusted) terms over the medium to longer term. The strategy is managed with a medium attitude towards risk with a maximum target of 60% invested in global equity markets at any given time.
- **PMPS Growth.** Objective: to build capital in real (inflation-adjusted) terms over the medium to longer term. The strategy is managed with a moderately high attitude towards risk with a maximum target of 80% invested in global equity markets at any given time.
- **PMPS Adventurous.** Objective: to build capital in real (inflation-adjusted) terms over the medium to longer term. The strategy is managed with a high attitude towards risk with a maximum target of 100% invested in global equity markets at any given time.

3. About Bordier UK

Bordier UK is the British arm of the Bordier & Cie Group. The firm is based in St James's at the heart of London's wealth management district and has been trading as Bordier UK since September 2014. Known previously as Berry Asset Management PLC, it commanded wide respect as one of the country's leading private portfolio management firms. The firm's relationship with the Bordier Group, an independent and international 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, with the team that led Berry Asset Management PLC continuing to run the business to this day.

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 – its range of services becoming ever broader over the years.

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Amongst its distinguishing features Bordier UK:

- concentrates 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, having won or having been shortlisted for no less than 46 prestigious industry awards since 2012.

www.bordieruk.com

4. About Bordier & Cie

The Bordier & Cie Group is built on solid foundations, with a strong Tier 1 capital ratio above 20%. Established in Geneva in 1844, and operating in six countries across three continents, the Group manages in excess of £7.7bn for circa 4,000 families.

Bordier & Cie is owned and managed by the descendants of the founding families, the Partners having unlimited personal liability for all the transactions they enter into. 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, enables it to focus clearly on its clients' long-term goals, rather than on the short-term targets of outside shareholders.

Bordier & Cie:

- manages AUM of more than £7.7bn (circa CHF 10.8bn) as of 31 August 2016;
- employs circa 225 staff globally, 35 of whom work within Bordier UK;
- 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.