

Asset management firm awarded £75 million portfolio

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Independent Financial Adviser group Almary Green has joined forces with specialist asset management firm Bordier & Cie (UK), by giving Bordier a mandate to manage a £75 million portfolio of client assets to be invested across a range of risk-graded portfolios on the Old Mutual Wealth platform.

Carl Lamb, managing director of Almary Green said: “We are delighted to be working with Bordier (UK) to help clients achieve their financial goals. We choose our partners carefully when it comes to deciding which fund managers to recommend, and are scrupulous in our due diligence. Our partners must not only deliver on performance, they must also have the high standards of service and ethics that are at the very core of the Almary Green ethos and proposition. Bordier (UK)’s professionalism and commitment is manifest and we look forward to working closely with them for the benefit of clients.”

Bordier (UK)'s chief executive Jamie MacLeod also added, “At Bordier (UK) we have a well-established infrastructure for working with financial advisers in this field, and an Investment Committee and investment team which boasts a track record for outstanding risk-adjusted investment performance over the longer term. We have opened ourselves up to scrutiny by a number of market-leading research orientated 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 that little bit easier.

“We are delighted that Almary Green and its award-winning financial planning team have elected to partner with Bordier (UK) in delivering their clients’ asset management needs.”

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