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Zurich adds Bordier UK Strategies to Retail Platform

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Specialist investment management firm Bordier UK confirmed today the addition of ten investment strategies from its Platform Managed Portfolio Service ('PMPS') to the Zurich retail platform – its Defensive, Cautious, Balanced, Growth and Adventurous strategies, along with five strategies risk profiled to Distribution Technology (the award-winning provider of 'Dynamic Planner') and created specifically for the Lighthouse Group.

Alistair Wilson, Head of Retail Platform Strategy at Zurich, which expanded its platform to include a discretionary management service for the first time as recently as January last year, said: "We are keen to ensure that advisers and their clients are able to access a wide selection of discretionary fund managers on our platform. Bordier UK will further strengthen the range of fund strategies advisers using our platform can already choose from and we are delighted to have them on board."

Malcolm Streatfield, Chief Executive Officer at Lighthouse Group, one of the UK's most prestigious and diverse financial advice firms, is delighted to be working with Bordier UK in helping deliver its clients' financial goals.

"We choose our partners carefully and are scrupulous in our due diligence; a discretionary asset manager must be able to deliver not only on investment performance but offer the highest standards of service and ethics, qualities which are central to our ethos and proposition here at Lighthouse."



Bordier UK Chief Executive Officer, Jamie MacLeod added: "We have opened ourselves up to companies like Defaqto, ARC and Distribution Technology in recent years to make the intermediary's task in selecting the right partner that little bit easier."

Our investment performance (as judged by ARC) was again outstanding in 2015 and 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 underlining the credibility of our proposition.

We are delighted now to provide access to our range of strategies to advisers using the Zurich platform; we look forward to building successful partnerships with them and to providing their clients with proven and robust investment solutions.”