



BORDIER UK PARTNERS WITH DYNAMIC PLANNER ON RISK TARGET MANAGED PORTFOLIOS

- **First and currently only DFM to sit on RTM panel**

17 January 2018

Dynamic Planner – the award-winning provider of digital risk profiling and financial planning services – today announces an exciting and timely new partnership with Bordier UK for its Bordier UK Risk Targeted (RT) Managed Service model portfolios.

The suite of five Dynamic Planner specific investment strategies (RT 3-7) covers Dynamic Planner risk profiles 3 to 7 and is now available direct through Bordier UK with platform availability to be announced shortly. It offers clients a broad range of investment solutions whilst being monitored within agreed risk parameters.

Chris Fleming, Financial Analytics Director at Dynamic Planner, commented: “Demand for our Risk Target Managed service continues to increase from advisers who are looking for more tightly controlled multi-asset investment solutions. Advisers and their clients can feel confident that this service provides a robust investment suitability framework, with an ever increasing range to choose from.”

David Muncaster, Director of Sales and Marketing at Bordier UK, commented on the news: “We are delighted to be part of Dynamic Planner’s Risk Target Managed solutions and proud to be the only discretionary fund manager currently available to Dynamic Planner users and their clients.”

The Dynamic Planner Risk Target Managed (RTM) service provides an independent quarterly review to ensure portfolios remain within the expected target volatility range for the respective Dynamic Planner risk profile. RTM dovetails positively with MiFID II, wide-reaching new regulation, introduced on 3 January 2018, which, in part, aims to ensure greater investor protection and also transparency in the investment process.

Muncaster added: “In a world of increasing investment uncertainty, we are making this important commitment to our adviser partners to provide greater confidence than ever before in the behaviour of the solutions we manage on behalf of their clients. As advisers continually strive to demonstrate the value they provide to their clients and meet the ever-higher standards demanded by the regulator, we believe RTM solutions are a big step forward in supporting these common goals.



“Advisers are looking to risk-targeted solutions to ensure the ongoing suitability of their clients’ portfolios matches their chosen risk profile. We see our Bordier UK Risk Targeted (RT) Managed Service (RT 3-7) as being the answer for advisers with concerns over risk-rated solutions, which often drift outside of their risk profile or whose rating is subject to change.

“We believe our combination of risk-targeting with full discretionary fund management is a unique offering which can enable advisers to achieve ongoing suitability, greater consistency of client outcomes and demonstrate value for money. The service is available directly through Bordier UK, making it accessible to all client segments, and is ideal as part of a centralised investment proposition.”

Almary Green, an independent financial advice firm based in Norwich, first partnered with Bordier UK in 2015 to manage its clients’ assets.

Carl Lamb, Managing Director at Almary Green, said: “At Almary Green, we take great pride in the quality of our team and the quality of advice we offer clients. Bordier UK’s full DFM service and model portfolios form a trusted part of one of our core client propositions. We also offer clients a risk-graded model portfolio service, managed by Bordier UK in line with Dynamic Planner’s risk profiles, ensuring they achieve the best possible outcomes for their investment.”

Bordier UK RT Managed Service strategy	Dynamic Planner risk profile
Bordier UK Risk Targeted 3	RTM 3
Bordier UK Risk Targeted 4	RTM 4
Bordier UK Risk Targeted 5	RTM 5
Bordier UK Risk Targeted 6	RTM 6
Bordier UK Risk Targeted 7	RTM 7

- ENDS -



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About DT and Dynamic Planner

Founded in 2003, DT is the award-winning provider of Dynamic Planner®, the UK's preferred provider of digital risk profiling and end-to-end investment process used by over 9,000 financial planners and a wide range of financial institutions.

The core risk profiling and asset allocation model was launched in 2005 and has grown in usage across the country ever since. Our team includes a unique blend of qualified investment analysts, financial planners and software usability, design and development experts.

Dynamic Planner helps its clients ensure investment suitability, deliver a great service and look good to their customers.

About Bordier UK

Bordier & Cie (UK) PLC ('Bordier UK') is the British arm of the Bordier Group and is based in St James's, at the heart of London's wealth management district. Known previously as Berry Asset Management PLC, it has been trading as Bordier UK since September 2014 and commands wide respect as one of the country's leading private portfolio management firms. The firm's relationship with the Bordier Group began in 2001 when a strategic alliance was formed through the Bordier Group's acquisition of a stakeholding 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.

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 a wide range of industry awards over the years.

www.bordieruk.com