

For immediate release

Thursday 16th December 2021

DUGGAN APPOINTED DIRECTOR OF SALES AND MARKETING

Specialist investment management firm Bordier UK is pleased to announce the appointment of Mark Duggan as Director of Sales and Marketing.

With some 20 years' financial services experience, Duggan joins the St James's based firm from Charles Stanley & Co. Limited, where he was for 8.5 years an Intermediary Sales Manager. Duggan helped to set up the firm's intermediary proposition, sharing responsibility for operations, legal, recruitment, regional and national distribution, and numerous marketing initiatives. Formerly an Executive Sales Consultant with Zurich Intermediary Group, Duggan is a CII Chartered Financial Planner, CISI Member and SLA Accredited.

He enjoys a far-reaching network of intermediary connections and will have responsibility for the development of Bordier UK's growing network of relationships with investment intermediaries, lawyers, and accountants in his new position, and for building on the firm's existing provider partnerships. He will work closely with the professional adviser community, helping them to better understand how discretionary investment managers can help to enhance their businesses in terms of client acquisition and satisfaction, and market position.

Duggan will report to Bordier UK CEO, Jamie MacLeod, in his new role. He said, *"Our continuing success in attracting market-leading talent is underpinned by the delivery of industry-leading service standards to our loyal clients and introducers. Mark is well-respected, his appointment underlining our commitment to the UK advisory space and intermediary market."*

"Our reputation for consistent risk-adjusted investment performance, allied to the breadth of market-leading adviser specific solutions we bring to the table, has seen us welcome numerous new clients over the course of the last year, including a series of large high-profile mandates, and has underpinned significant growth in our assets under management. Mark's appointment confirms our intent, to develop further relationships with the industry's leading firms."

- ENDS -

Journalists seeking further information should contact:

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NOTES TO EDITORS

1. About Bordier UK

Bordier UK is the award-winning British arm of the Bordier Group and is based in St James's, the heart of London's wealth management district. Bordier UK has a single focus, the provision of investment and wealth management services for UK and international clients – the clients of professional advisers, HNWIs, family offices, trustees, charities, and livery companies alike – its range of services becoming ever broader over the years.

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 been shortlisted for more than 90 prestigious industry awards since 2014.

www.bordieruk.com

2. About Bordier & Cie

The independent Bordier Group is built on solid foundations, with a strong Tier 1 capital ratio of 31.1%¹. Established in Geneva in 1844, and operating in six countries across three continents, the Bordier Group manages c.£12.4bn for more than 4,000 families¹.

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

The Bordier Group:

- employs circa 270 staff globally, 35 of whom work within Bordier UK
- has offices in Bern, Brest, Geneva, London, Montevideo, Nyon, Paris, Rennes, Singapore, Turks & Caicos Islands and Zurich

www.bordier.com

¹ At 30.06.21

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. Incorporated in England No. 1583393.