

bordier¹⁸⁴⁴

| BORDIER UK

Tailored MPS
solutions

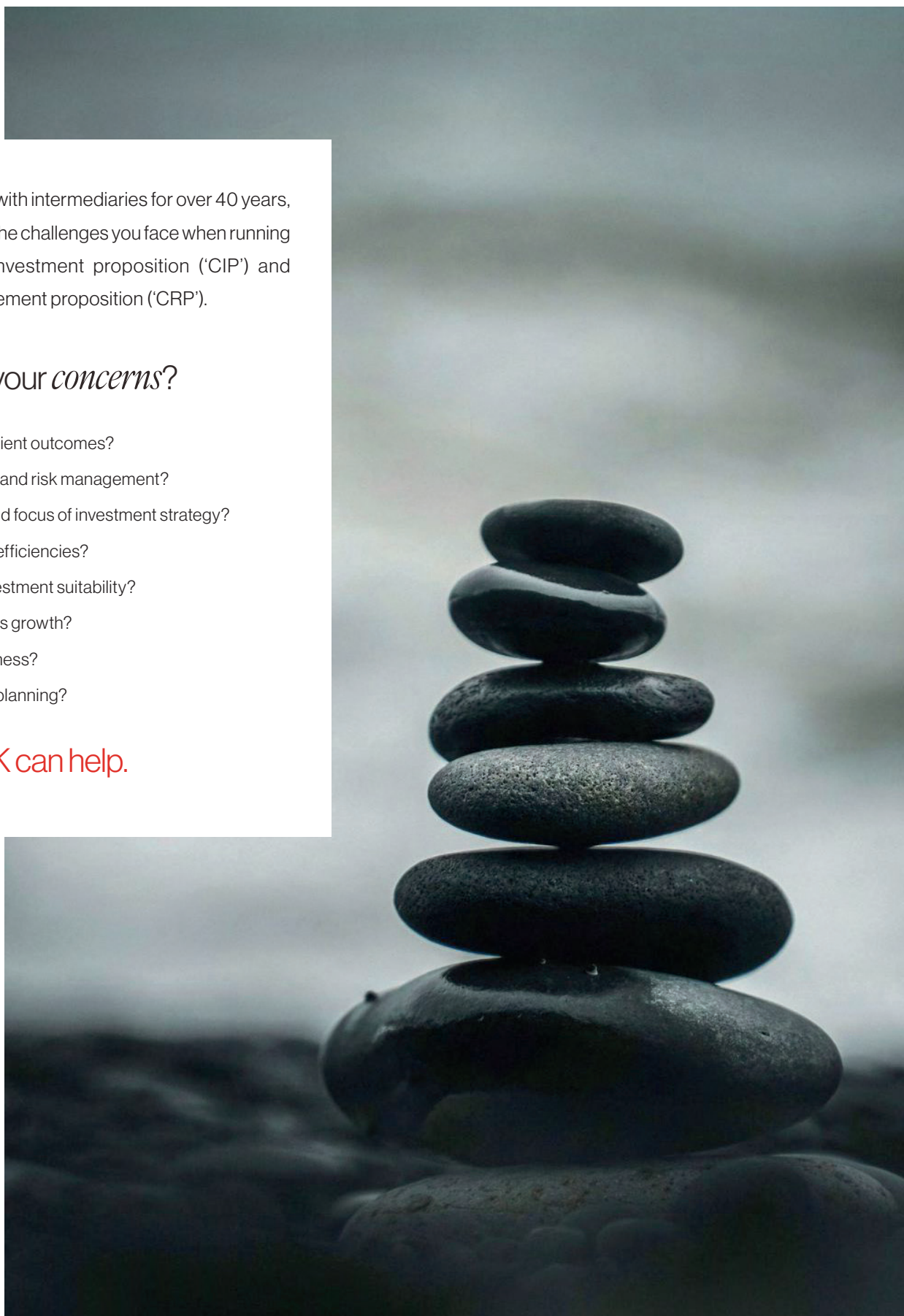
For professional advisers only

Having worked with intermediaries for over 40 years, we understand the challenges you face when running a centralised investment proposition ('CIP') and centralised retirement proposition ('CRP').

What are your *concerns*?

- Consistent client outcomes?
- Governance and risk management?
- Capability and focus of investment strategy?
- Operational efficiencies?
- Ongoing investment suitability?
- New business growth?
- Legacy business?
- Succession planning?

Bordier UK can help.





Bordier UK can *help*

We are a wealth and investment manager that has partnered with UK intermediaries since 1981, providing their clients with high quality and proven investment management solutions.

We understand that a tailored MPS solution should be bespoke to a firm's needs and requirements and always treated as such.

Our aim is to provide flexibility for a firm to choose the services and features appropriate for them, to enhance what they offer to their clients, whilst building additional efficiencies and support functions into their business.

We pride ourselves on the expertise we offer in platform and risk-mapping integration, as well as a distinguished track record for delivering consistent investment outcomes.

We have been managing truly bespoke mandates for adviser firms on third-party platforms for over a decade and recognise the importance of a flexible investment process to support and enhance the ever-changing business models of our professional adviser partners.

How we support you

- Tailored and unique solutions
- Portfolio management process to ensure consistent client outcomes
- Risk managed approach to support simple ongoing investment suitability
- Implementation of a governance and risk management framework
- Legacy asset support and transition
- Efficient and swift execution of investment decisions
- Independent and intermediary-focused investment partner

A tailored MPS solution from Bordier UK will support and enhance your existing investment philosophy, improve efficiencies in the way your portfolios are managed and outsource associated governance and business risks.

This is a solution built for you, driven by you.

A trusted partnership to maintain the identity and DNA of your firm, whilst your clients benefit from additional resource, expertise and a rigorous investment process

Where we add *value*

/ Supporting your CIP/CRP

- CIP/CRP experience
- Asset allocation
- Governance/risk management

- Platform implementation
- Commercial benefits
- Fund selection

CIP/CRP *experience*

- Proven CIP/CRP partner with significant experience
- Alignment to existing investment philosophy – your identity/DNA
- Trusted partnership
- Personalised adviser support
- Tailored client communications

Platform *implementation*

- Discretionary rebalancing
- Implementation of cheaper institutional share classes
- Assigned implementation manager
- Enhanced trading oversight
- Operational excellence with all major platforms
- White-labelled strategies

Asset *allocation*

- Align to existing asset allocation or chosen risk profiler
- Efficient execution
- Different strategies for accumulation and decumulation clients

Commercial *benefits*

- Improved operational efficiencies
- De-risk your business
- Reduce costs
- Enhanced investment governance
- Support future growth
- Increase the value of your business

Governance/risk *management*

- Maintain a compliant framework to support consistent client outcomes
- Adherence to set risk targeted strategies to comply with ongoing investment suitability
- Bordier UK Investment Committee oversight – average 23 years of experience
- Reduced responsibility under Consumer Duty requirements

Fund *selection*

- Institutional research process
- Direct fund manager access
- Expertise in active and passive investments
- Incorporation of existing buy list
- Currency considerations



We have been looking to partner with an investment manager for the last two years. We needed to work with a firm that understood our investment ideas and wanted to work with us to make sure our DNA continued to run through our centralised investment proposition, also adding value, and with Bordier UK we have found exactly that.

We found Bordier UK's investment management team willing to listen, experienced and pro-active. We are now able to spend more time adding value for our clients through our financial planning, whilst the heavy lifting on the portfolio management is done for us by Bordier UK. *Adviser firm, East England*



I was delighted with how much added value the team at Bordier UK have brought to our investment proposition, whilst maintaining our independent style and identity. They are an extremely knowledgeable team with a vast amount of experience in this area – my only regret was that we didn't do this years ago.

With less risk and administration for our business and an even stronger offering for our clients, we are very pleased to be partnered with Bordier UK. *Adviser firm, North West England*



When we were looking for assistance with our investment proposition, it was really important that we found an investment firm that could work in line with our existing process. It was important that we could build a trusting and longstanding relationship. We required the firm to demonstrate extensive knowledge and access to specialist investment, tailored to our needs. After meeting many DFM firms, Bordier UK were the clear front runner and we have been absolutely thrilled with our decision.

Each and every part of the process from design and implementation through to service has been a delight. The sense that we, as a service-based family run business, are working with a similar structured firm, albeit with a global footprint, has made each part of the journey feel like a true partnership. We would highly recommend Bordier UK to any firm that are looking for a professional and trustworthy long term investment partner. *Adviser firm, South West England*

for generations.

EXPLORE
UNDERSTAND
PROTECT
DEVELOP
PASS DOWN

Contact *us*

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