bordier 1844

| WEALTH MANAGEMENT SERVICE

Bespoke *to you*

What makes us *different* makes all the difference

Family

Independence keeps us unconflicted, unencumbered, undistracted.

Innovation

Adapting to the new faster, we stay ahead for longer.

Bespoke

We take your finances and happiness very personally.

Reliable

We build wealth steadily, sustainably and very successfully.

Evolving

Responding quickly to different needs, environments, situations.

The right service *for you*

Our Wealth Management Service is built around your financial needs and aspirations. Whether your priority is maintaining your lifestyle, planning for retirement, or protecting wealth for future generations, **we are here to help you achieve your goals**.

We will draw upon over 180 years of experience to build a bespoke investment portfolio that will meet your investment objectives and long-term targets. We will actively manage your portfolio on a discretionary basis, where we make day-to-day decisions within an agreed framework and risk profile, and report to you (and your professional adviser) on a regular basis. As your life evolves and your financial situation changes, your strategy can evolve with it.

We fully appreciate that in most cases your capital is not replaceable, and the utmost care must be taken to preserve it, for you and for future generations. We therefore aim to meet your expectations without incurring undue risk, which will enable you and your family to sleep soundly at night knowing that your wealth is in safe hands.

A portfolio *designed for you*

We know wealth management is about more than performance – **it's about people**. Many of our clients have been with us for generations, and we take that responsibility seriously. We aim to provide you with the right tools, structures and insight to manage your wealth efficiently and confidently.

Meeting your requirements

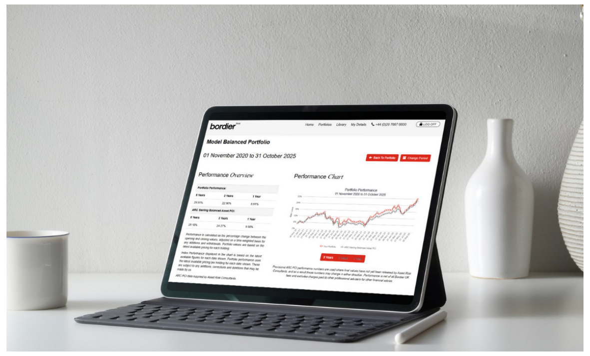
Your investment portfolio will be built around your personal circumstances, risk appetite and long-term ambitions – always with the flexibility to evolve as your needs change. No two clients are the same, so each client situation will be assessed on its merits and the chosen investment strategy can be adapted to meet your personal needs.

Personal service

Unlike larger firms, your portfolio will be managed by two named Investment Directors who both sit on our Investment Committee. You will therefore have a direct line of communication to the decision-makers overseeing your investments. You will not be passed off to a relationship manager with little or no knowledge of the reasons behind the decisions being made.

Your Investment Directors will be supported by our award-winning Client Services team who are available to assist you and your professional adviser with any administration matters that arise.

Personalised reporting and digital tools



You can remain well informed about our investment decisions via regular investment reviews, market updates and videos direct from our Investment Committee whilst you will have instant access to your portfolio valuation online and via our mobile app, in addition to quarterly reporting.

In-depth expertise

Our senior Investment Directors average over 30 years of investment experience, with some having worked together for more than two decades. Their deep knowledge of investment markets, and their long-term perspective shape every client portfolio, meaning you benefit from an investment capability that offers consistency and continuity, coupled with the greater care and attention that a smaller firm can offer.

Flexible investment structures

We can manage your portfolio within a wide range of tax-efficient vehicles and investment wrappers, including ISAs, SIPPs and SSASs, trusts and offshore bonds. We will also work closely with your accountant, solicitor or financial adviser to ensure the most suitable and tax-efficient setup.

Access to premium services

You have access to unique opportunities and a broader suite of services via the wider Bordier Group. This includes Lombard loans, private banking, private equity, offshore custody and access to non-UK situs investments, subject to your current circumstances and risk appetite.

A *focus* on investment management

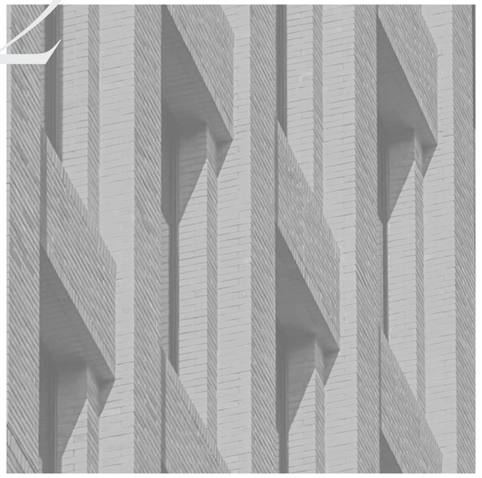
Our investment philosophy has remained consistent for over 40 years, with capital preservation at the core of our robust investment process, to help protect and grow your wealth over the long term.

01

Focus on wealth preservation

Capital preservation is at the core of our Investment process. We know that your capital is not easily replaceble, therefore we never take risk lightly. Each and investment decision within your portfolio is made with care.

02



Tried-and-tested methodology

Members of our Investment Committee have worked together through many economic cycles, through the good times and bad. This experience ensures that investment decisions are made dispassionately and in a measured fashion.

03

Investment in funds

Your portfolio will be constructed using carefully selected collective investment funds instead of direct equities or bonds. This helps to increase diversification, enables us to blend investment styles and geographies, and means we can implement strategic changes made by our Investment Committee quickly and efficiently. They will also use either fully active investments or a blend of active and passive investments.

04

Active tactical decisions

We take a highly active approach to asset allocation, tactically adapting your portfolio to meet evolving market conditions. We are not bound by traditional portfolio thinking or benchmarks. Instead, we have the freedom and flexibility to seek the right opportunities, wherever they may be, to meet your aspirations and objectives.

05

A multi-asset approach

We will construct your portfolio from a range of asset classes, which can include equities, bonds, commercial property, physical gold, commodities, alternative investments and cash. The allocation to each of these is tailored to your chosen risk level. This multi-asset approach ensures your portfolio benefits from greater diversification, which in turn helps us to reduce risk.

A family and business *aligned*

We are a family-owned wealth and investment manager dedicated to looking after private clients and their families in the UK and around the world. In an ever-changing world, our mission is to build portfolios that protect and grow your wealth over the long term. As part of the independent Bordier Group, we can draw upon over 180 years of wealth and investment management experience.

At Bordier UK, we have been managing wealth for families for over 40 years and have multiple generations of families that rely on us, so we know and fully appreciate the responsibility that is upon us.

We know from experience that selecting an investment manager is an extremely important decision for you to make and one which can have far reaching consequences for you and your family. As a client of Bordier UK, you will benefit from the care and attention of a family business that has remained in the same, private hands for a very long time. With no outside shareholders we can focus all our energy solely on looking after our clients, with no external pressures. We believe this creates a perfect alignment of interest with you, something not found in many investment firms.

With Bordier UK, you will benefit from the best of both worlds: a range of investment services and investment management expertise of one of the world's leading financial institutions, and the flexibility of a bespoke service and the agility that only a firm of our size can offer.

"over 180 years of wealth and investment management experience"

Welcome to the *family*

1 Speak to a member of our team

Arrange an initial meeting with one of our Investment Directors to discuss how we can help you achieve your financial goals. Please contact us by calling 020 7667 6600 or emailing info@bordieruk.com.

2 Receive a bespoke investment proposal

From this initial meeting, your lead Investment Director will provide you with a bespoke investment proposal that will set out our understanding of your financial situation, your financial aims, your expectations, your desired investment objective, your attitude to risk and a sample asset allocation of how your investments will be managed.

3 Becoming a Bordier UK client

If you then decide to appoint Bordier UK to manage your investments, your lead Investment Director and our Client Services team will ensure your new account is set up quickly and easily. Our investment team will then create your bespoke portfolio and continue to support you throughout your journey with us. In addition to direct access to our award-winning Client Services team, you will receive regular face-to-face meetings (either in person or via video link), in-depth quarterly reports, an annual tax report (if appropriate) and access to our mobile apps.

For further information about Bordier UK, our services and latest updates, visit our website at bordier.com.

Ami Bordier, founder of Bordier & Cie, first-generation partner.

Family is in *our DNA*

Ami Bordier with his sixteen grandchildren.

for generations.

EXPLORE
UNDERSTAND
PROTECT
DEVELOP
PASS DOWN

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