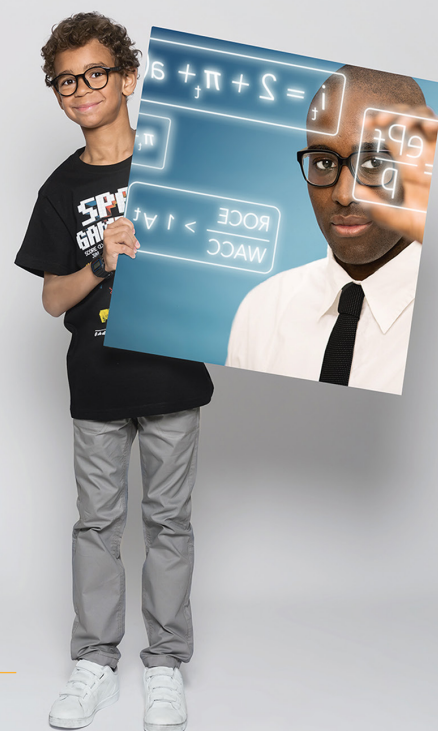


Design, build and implement your own CIP on Standard Life

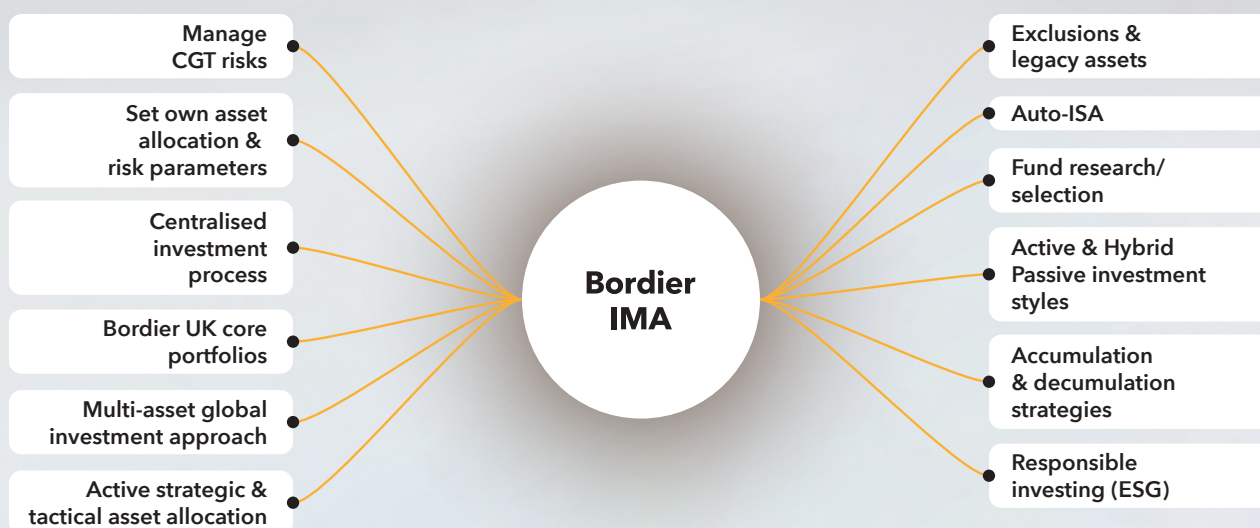
BORDIER IMA

Access to the full investment management capability and experience of Bordier UK on the Standard Life platform.

- Centralised investment propositions - Have complete control and flexibility to access as much or as little of our skillset as you require. We partner with firms, supporting them to build assets and offer both ad valorem and fixed fee commercial terms.
- Bordier UK core strategies for bespoke clients - Access the full functionality of bespoke discretionary management for your clients with individual needs not met through a traditional MPS service.



WHAT CAN YOU DO IN A BORDIER IMA?



CIP/CRP CONSULTANCY

Each adviser firm is individual, and through Standard Life IMA we can provide the ability for you to design and implement your own investment solutions for your clients. You can access as much or as little of the following support:

- Asset allocation in line with your chosen risk profile tool/methodology
- Fund research and selection
- Portfolio construction
- Discretionary implementation
- Investment Committee input/participation
- MiFID II compliance (pre-10% drop notification to advisers)
- Client transition plan
- Marketing/Communication support
- Case studies
- Your own CIP/CRP factsheets
- Legacy asset analysis

KEY FACTS

	Individual account	Your CIP/CRP
Annual management fee	0.30% plus VAT	Ad valorem or fixed fee
Minimum investment	£250,000	£0-£30m
Number of strategies	5	To meet your needs
Investment style	Active & Hybrid Passive	To meet your needs
Income/growth models	Both	To meet your needs
Asset allocation	Bordier UK	Agreed with you
Risk parameters	Bordier UK	In line with your preferred approach
Auto-ISA	Yes	Yes
Manage CGT risks*	Yes	Yes
Exclusions*	Yes	Yes
Legacy assets*	Yes	Yes

*Additional charges apply

ABOUT BORDIER UK

We are a specialist investment manager that has partnered with UK professional advisers since 1981, providing their clients with high quality and proven investment management solutions. Through this experience, we have developed a comprehensive and flexible range of services to meet the demands of a modern professional adviser business.

We work with some of the leading adviser firms in the industry and our partners include top 25 independent financial advisers, national advice businesses and networks.

CONTACT US



David Muncaster
Director of Sales and Marketing
m: +44 (0) 7738 697 154
e: david.muncaster@bordieruk.com



George Moorey-Denham
Intermediary Partnership Development Manager
m: +44 (0)7946 161 154
e: george.moorey-denham@bordieruk.com

bordier | 1844

Bordier & Cie (UK) PLC | 23 King Street | St James's | London SW1Y 6QY
t: +44 (0)20 7667 6600 | f: +44 (0)20 7930 2911 | bordieruk.com
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Risk warning

The value of an investment and any income from it may fall as well as rise, may be affected by exchange rate fluctuations and you may not get back the amount you originally invested. The information in this document does not constitute an offer of, or an invitation to buy or sell any security. Levels and bases of tax can change. The securities detailed in this document may not be suitable for all investors. Please note that the model portfolios are applied to client accounts by the platform provider, however individual accounts may differ due to restrictions and exclusions applied by the adviser. CL5478/20200207/1.03