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Bordier & Cie (UK) PLC
Wealth and Investment Management

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Bordier UK updates services and reduces MPS fees

Bordier & Cie (UK) PLC ('Bordier UK'), the award-winning wealth and investment manager, is pleased to announce that, following a strategic review of its services, it has expanded its range of purpose-built decumulation strategies, renamed its Hybrid Passive strategies and reduced its annual management charge on select managed portfolio services.

The changes are designed to give UK advisers greater clarity and improved value for their clients and to strengthen the range of options available to advisers supporting clients in both accumulation and decumulation.

Changes to services and strategies

To refine and clarify its proposition, Bordier UK has:

- Renamed its Hybrid Passive and Hybrid Passive Risk Targeted strategies

  The services are now called the Blended Managed Portfolio Service ('MPS') and Blended Risk Targeted ('RT') MPS. The change in name better reflects the blend of active and passive funds within the strategies.

- Updated the investment approach for Risk Targeted Decumulation ('RTD') range

  Following a recent rebalance, Bordier UK has moved all core equity exposure within its range of RTD strategies (4–7) (excluding thematic and global allocations) to passive funds. This has reduced underlying ongoing charges figures ('OCFs') by 2-15bps across the range.

  It continues to use active management in other asset classes across the range, including alternatives, where the firm believe it adds the most value, underpins Bordier UK's differentiated approach and helps provide a smoother investment journey.

- Introduced an additional risk profile within its RTD Service

  The new risk profile, RTD 7, is designed for advisers with clients in drawdown who can take on more equity risk (current equity allocation of 65%) and remains aligned to Dynamic Planner's Risk Managed Decumulation 7 expected annual Value at Risk parameters.

Reduction in MPS fees

Bordier UK has reduced its annual management charge ('AMC') across several propositions for all new and existing clients:

Service	Old AMC	New AMC
Blended MPS*	0.30%	0.20%
Blended RT MPS*	0.30%	0.20%
Direct MPS	0.75%	0.60%

**On third-party platforms only.*

These reductions deliver value for advisers and their clients, who will continue to benefit from the same disciplined investment approach advisers have come to expect from Bordier UK.

The changes are effective as of today, 1 December 2025.

Commenting on the review, Mark Duggan, Managing Director – Distribution said: "At a time when advisers need an even greater choice of investment solutions to meet the needs and better manage the expectations of their clients, it's important that our services continue to evolve to ensure they best support the financial adviser community. That's why we've undertaken a comprehensive review of our proposition and have implemented this series of enhancements, each designed to improve the overall client experience, whilst at the same time reducing costs."

- Ends -

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Notes to editors

About Bordier & Cie (UK) PLC

Established in 1981 by Jamie Berry, Bordier UK (then Berry Asset Management) is part of the Geneva headquartered Bordier & Cie. Based in St James's, at the heart of London's wealth management district, the company is an award-winning wealth and investment manager, with a single focus – providing investment and wealth management services to private clients, the clients of professional advisers, family offices, trustees, charities, City livery companies and others.

www.bordieruk.com

About Bordier & Cie

Bordier & Cie is built on solid foundations with a Tier 1 CET ratio of 30.8%[1]. Established in Geneva in 1844, the Group employs circa 280 staff globally, 40 of whom work within Bordier UK; has offices in Bern, Brest, Geneva, Lausanne, London, Montevideo, Nyon, Paris, Rennes, Singapore, Turks & Caicos Islands and Zurich; manages more than £17.4bn in assets[1].

Bordier & Cie is owned and managed by the descendants of the founding families – the Partners having unlimited personal liability for all transactions. 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.

www.bordier.com

[1] 30 June 2025.