

For immediate release

8 December 2025

Bordier UK added to Ascot Lloyd retirement panel

Bordier & Cie (UK) PLC ('Bordier UK'), the award-winning wealth and investment manager, is delighted to have been named as one of two retirement investment providers for Ascot Lloyd Limited ('Ascot Lloyd').

Ascot Lloyd, the rapidly growing national financial planning and advice firm has added Bordier UK's Risk Targeted Decumulation ('RTD') Service, a purpose-built investment solution to support clients taking a regular income in retirement, to their centralised investment proposition panel, with the service available to Ascot Lloyd's 140+ fully employed financial advisers.

The RTD Service recognises the unique challenges faced by clients in drawdown, with four decumulation investment strategies designed to prioritise capital preservation and minimise the risk of eroding capital values in falling markets whilst investors take a fixed regular income. As of 1 October 2025, the service has passed five years of positive performance and consistent positive outcomes for clients in retirement.

Commenting on the appointment, Mark Duggan, Managing Director of Distribution, at Bordier UK said: *"We're really pleased to be working with such a high-quality firm in Ascot Lloyd, helping empower and support their adviser network to better manage their clients' expectations and improve client outcomes. Ascot Lloyd recognise and understand that our RTD Service is a distinct solution within the unit cancellation section of the decumulation space and is very different to solutions generating a natural income for clients in drawdown. We are looking forward to supporting and engaging with Ascot Lloyd advisers across the country."*

Mona Christensen, Head of Product, of Ascot Lloyd said: *"After a robust selection and due diligence process, it was clear that Bordier UK's independence and investment expertise were a perfect fit for our business. The RTD Service supports our target market assessment for our retirement income clients and assists our advisers with their ongoing client suitability assessments. Most importantly, the service provides peace of mind for our clients who are worried about taking undue risk and seeking a smoother financial journey in their retirement."*

- 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 assets¹.

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.

About Ascot Lloyd Limited

At Ascot Lloyd, we believe financial advice should be clear, straightforward, and free from confusing jargon. Our approach is to provide down-to-earth, transparent advice that gives you confidence in your financial plan and helps transform your ambitions into achievements. Whether you're planning for retirement, managing investments, or optimising your tax strategy, we simplify the complexities of finance into actionable steps that make sense.

We are dedicated to strong governance, cutting-edge technology, and exceptional client service, ensuring your financial future is in capable hands. We offer advice face-to-face or over the telephone, which you can trust, backed by our presence in key financial hubs such as

London, Birmingham, and Leeds. Additionally, we have a broad regional reach throughout the rest of the UK. Your financial goals are our priority, and we're here to guide you every step of the way with clarity and care.

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www.ascotlloyd.co.uk

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