

For immediate release**Wednesday 6 November 2024****IAN HEAP APPOINTED CEO OF BORDIER & CIE (UK) PLC**

Bordier & Cie (UK) PLC ('Bordier UK'), part of the Swiss private banking group Bordier & Cie, is delighted to announce the appointment of Ian Heap as Chief Executive Officer. The appointment is subject to FCA approval.

Presently Director of Portfolio Management, and a Board Director since 2019, Heap launched his career in the field of private client wealth management in 2000, joining the St. James's based firm in 2005 from Close Brothers Wealth Management, where he was responsible for a book of discretionary private and corporate clients.

As a Director of the firm for the last five years, Heap has headed the portfolio management team and provided support and advice on internal issues and external challenges, giving him a strong platform for his new position and responsibilities.

Commenting on the appointment, Jamie Berry, Executive Chairman and Interim CEO at Bordier UK said, *"Our business is characterised by deep experience and long tenure. I have been managing clients with the business for more than four decades now, working hand in hand with our CIO for more than 30 years, and with Ian for 20 come next May. This stability has served our clients well and has underpinned the success of our business, with UK assets today at a record level, and Bordier established as one of the most highly regarded private client wealth management firms operating in UK asset management today."*

He continued, *"In our 43 years we have only had two CEOs, and as the founder of our business, this appointment is particularly important to me. Having worked closely with Ian over so many years, I know that our clients and the business will be in very good hands, and I am delighted that he has accepted our offer."*

Grégoire Bordier, Partner at Geneva-based parent Bordier & Cie echoed Jamie Berry's sentiments. He said, *"We first invested in the UK business in 2001 and put our name over the door in 2014, ten years ago. That decision not only marked our commitment to the UK market, but the importance we place on London as one of the world's leading hubs for private client asset management. The appointment of a new CEO is critical to our continuing success, and having considered a wide pool of candidates, from many leading firms, I speak for all the Partners when I say that we have the greatest confidence in Ian's ability to take the business forward, and to write the next chapter."*

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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 a specialist investment manager, with a single focus – providing investment and wealth management services to private clients, the clients of professional advisers, HNWIs, 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 c33%¹. Established in Geneva in 1844, the Group employs circa 280 staff globally, 39 of whom work within Bordier UK; has offices in Bern, Brest, Geneva, London, Montevideo, Nyon, Paris, Rennes, Singapore, Turks & Caicos Islands and Zurich; manages more than £16bn for over 4,000 families¹.

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 2024.

This document is issued and approved by Bordier & Cie (UK) PLC (of 23 King Street, St James's, London SW1Y 6QY), which is authorised and regulated by the Financial Conduct Authority, FCA No. 114324. Incorporated in England No. 1583393.