

plates-formes
sodi



Managing Partner and cofounder
Maurice Levy



Managing Partner and cofounder Pierre
Retord



The company headquarters in Geneva

Behind the scenes support

Small, independent operators tend to struggle in competition against larger organizations that are better able to exploit economies of scale and afford their own back office departments. In the world of financial investment, Swiss company Plates-formes Sodi SA provides an invaluable service for independent financial advisors that allows them to go toe to toe with the big hitters in a multi-billion-euro industry.

“Our goal is to make it possible for our members to focus on their core business by offering an infrastructure that frees them from the burden of dealing with administrative tasks, regulatory red tape and IT meltdowns,” says Managing Partner and cofounder Maurice Levy. “In order to do this, we have developed a management platform covering a host of different services.” The company has 27 member currently using its services. It maintains complete independence and has no stake in any of the companies it serves. “We are an outsourcing service provider and with our workforce of 25 serve a combined client list of around 75 people,” explains Mr. Levy. The relatively small individual companies also benefit from the advantageous

conditions that Plates-formes Sodi is able to negotiate with banks and financial institutions on behalf of its members. Furthermore, the way its fees are structured means that members are not penalized when their businesses flourish. “We have a degressive pricing structure for our services,” explains Mr. Levy. “That means that in addition to a fixed fee for each service used, there is also a flexible component which varies within a set range. As a result, when a company grows bigger, its bill for our services does not rise to match.” Another advantage is that Plates-formes Sodi enjoys very long-term relationships with its clients, many of whom have been with it since the beginning. This may also be put down to the fact that its business

model is unique in Switzerland and that it is filling a real gap in the market. “We promote entrepreneurship and diversity in the market,” insists Mr. Levy. “We level the playing field by giving even the smallest one-man operation the backing of a 25-strong organization. With the slew of new regulations currently being applied in the Swiss banking and finance sector, we are able to deflect much of the added work and costs that this causes.” Many banks actually recommend smaller investment management companies join Plates-formes Sodi because it reduces their risk profile. This has kept the company’s own growth steady despite the fact that fewer independent advisors are setting up shop. “Currently we specialize in

asset management companies, but we are looking at expanding our services to cover foreign investment funds looking to become established in Switzerland,” says Mr. Levy. “We are also working together with a partner to set up a similar platform in Gibraltar, which will operate in accordance with UK law. Even further away, we are working together with a law practice in Panama to access the South American market.” ■

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