

in brief

Positioning of sodi platforms

The members of sodi platforms are independent asset managers who develop their businesses as part of a real federation. Established in Geneva in 1996, sodi platforms are built on a unique model in Switzerland. Managed by two partners, Pierre Retord and Maurice Levy, they provide their member companies with backing as well as a broad range of services. With a membership of some twenty companies in the field of financial services, they are an important player in the region and their ambition is to expand further in Geneva and the Lake Geneva area.

The aim of sodi platforms is to provide their members with administrative and logistical services in order to give them more time to concentrate on their clients' needs and to ensure the continuity of their companies. So, they offer their expertise in strategy advice and highly qualified back and middle office services covering infrastructure, accounting, IT, administration and compliance.

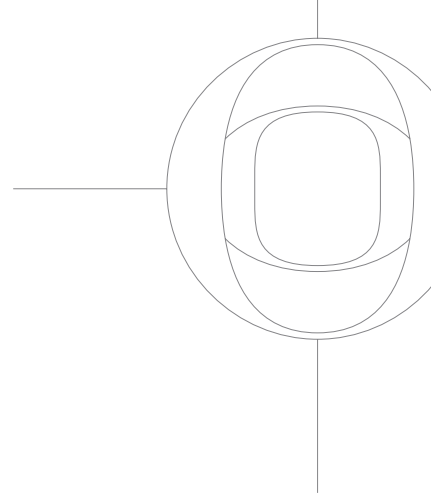
While preserving their members' independence and guaranteeing them the strictest confidentiality, the platforms enable each member to benefit from group strength. They allow them to make economies of scale and give them access to special arrangements with banking and financial institutions. They also promote synergy and the exchange of information by providing an area for discussion and reflection.

sodi platforms ensure a personal and customized service. They are committed to developing a proactive business strategy with the ability to react rapidly to their members' needs. They also endeavour to provide new and efficient solutions that are in line with their expectations and the changing requirements in their profession.

With a strong sense of entrepreneurship and independence, the partners of sodi platforms share the same values which ensure the continuity and cohesion in the leadership of their company. Firm believers in transparent and ethical business practice, they attach great importance to the rules of ethics that govern asset management and are aiming to make sodi platforms a reference in the field.

They have built up a qualified team, they provide favourable working conditions and conscientiously encourage the staff's development within the company. It is on a day-to-day basis, working closely and with mutual respect that they build relations based on trust and consideration and that they undertake to preserve the originality of sodi platforms and the values on which their work philosophy is founded.

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Basic principles

INDEPENDENCE

- through the partners' financial autonomy / by investing private capital without being bound to a bank or financial institution
- by avoiding any interference from sodi platforms in their members' business activities
- by allowing the members to conduct their business independently and by preserving sodi platforms' independence of mind

TRANSPARENCY

- by never taking commissions
- by taking decisions jointly with the members
- by informing the members clearly and precisely of sodi platforms' income and expenses

SYNERGY AND EXCHANGE

- by acting as a partner and developing special relations with their members
- by creating a club to encourage discussions, interaction and thoughts between members
- by acting as a catalyser and forerunner for the members

SATISFACTION

- by putting the accent on human relations and respect
- by ensuring accessibility to the partners
- by making it pleasurable for the members and the staff to come to work in a positive working environment and friendly atmosphere