



Case Study: Thomson Tyndall

Why Copia?

Thomson Tyndall create and manage bespoke investment portfolios for many of their clients, but also operates a Managed Portfolio Service using model portfolios. As more and more clients have been attracted to the managed portfolio services (MPS), the task of managing those model portfolios became increasingly onerous.

The firm therefore began to look for a Discretionary Fund Manager (DFM) who could help run their models for them. They chose Copia because they were comfortable that they would be working together in genuine partnership. Copia would help to run the Thomson Tyndall models rather than impose their own. Most of the alternative suppliers wanted to white label their own models.

Copia worked well with our existing platforms and provided a genuinely custom built MPS and Thomson Tyndall also felt that Copia had the edge with their professional research service and levels of resource.

Partnership in action

Mike Baggaley, one of Thomson Tyndall's senior consultants who also manages clients' investment portfolios, sees the benefits of working with Copia first and foremost through the eyes of their end clients. "The clients are very happy with the results: they see the high quality service that Thomson Tyndall provide (and can now focus on) and they benefit from the performance from the model portfolios that we design and agree with Copia, who then implement them."

From Thomson Tyndall's point of view the chief benefits of working in partnership with Copia are that Copia take away the administrative burden and help to mitigate the risk to the Business. "They join us on our Investment Committee where we agree and build our portfolios. We then agree the process and procedures with Copia and make sure the models are running as expected," says Mike Baggaley who goes on to add: "Thomson Tyndall really appreciate having direct contact across the Copia team, who are all very responsive.



About Thomson Tyndall

Founded in its present form in 2016 Thomson Tyndall has roots and client relationships dating back to 1969 through The Thomson's Partnership. They offer independent whole of market advice to private clients and their families, as well as to charities and businesses. The business is majority owned and managed by its staff. This stability of ownership enables the firm to take the long view necessary when advising clients and their families.

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Mike Baggaley
Senior Consultant
Thomson Tyndall

The bespoke client facing documentation that Copia supply is also excellent and is well received by our clients. It's exactly what our financially aware clients want, giving them a deeper understanding of our investment process and documenting all of the decisions made.

What next?

Thomson Tyndall are looking forward to continued growth in the number of their MPS clients and to increasing their funds under management with Copia. “Our clients are happy and as a result they refer other clients to us. Copia helps drive this indirectly by enhancing the performance of our portfolios and, by easing the administrative burden, allowing us to focus on delivering a premium service to our client base.”

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