

Case Study: Roxburgh Group

Why Copia?

Roxburgh has worked with Copia for a number of years, following an introduction from Copia's parent company Novia. Initially the relationship was built around Copia's 'off the shelf' portfolios but the impact of the MIFID II regulations in terms of increased compliance led Graham Hill and his team to consider Copia's Custom Managed Portfolio Service.

Beyond the outsourcing of the compliance risk, Roxburgh was attracted by the completely bespoke nature of the Custom MPS service. "With Copia, our portfolios are entirely our own solutions: we define investment strategy criteria for our clients and then work with Copia's Portfolio Manager and their team on a joint investment committee to design and manage bespoke portfolios."

Partnership in action

Since the outset of using Copia's Custom service, Graham Hill says the relationship has been "extremely sound – they give us lots of information and provide very good marketing materials, with Roxburgh branding, for us to share with our clients. We can speak to senior people at Copia at any time for advice which is not generally the case with other discretionary fund managers that we work with."

Graham Hill regards the relationship as a partnership, and references the value of Copia's advice during the Covid pandemic: "We have had lots of constructive and helpful discussions during the pandemic when the markets were in turmoil."

He says that Copia always compare very favourably with the competition in terms of the quality of their advice and the strength of the relationship, and comments that Copia's pricing is "fair and reasonable", given the level of service that Roxburgh receives which, in turn, enables the firm to offer a stronger, cost-effective service to its client base.



About Roxburgh Group

Founded in 1964, the Roxburgh Group provides independent financial advice and insurance services, as well as property sales and letting, to thousands of families and businesses in central Scotland and beyond.

Led by director Graham Hill, its financial services division offers independent financial advice to a wide range of individuals and businesses to provide effective investment planning, including retirement strategies and other forms of saving.

“We like the fact that we own the brand that our clients see – that the portfolios are entirely our own. Would I recommend them to other advisers? Definitely. Especially if they have their own portfolios: for us Copia managed the transfer seamlessly and I’m very happy with the relationship that we’ve built with them.”

Graham Hill
Director
Roxburgh Group

What next?

Based on Roxburgh’s experience to date, Graham Hill expects to increase the level of their funds under management with Copia particularly as the number of platforms on which Copia operates continues to expand.

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