



Wealth
Management

Values worth sharing

An introduction to LGT



| Forward-looking
for generations



Cover image

Franz Anton von Scheidel, detail from "Depictions of conchiliae in watercolour after Johann Carl Megerle von Mühlfeld (1765–1840)," late 18th century.
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Inside the Princely Collections

For more than 400 years, the Princes of Liechtenstein have been passionate art collectors. The Princely Collection is the result. Comprising more than 1,600 paintings, the collection is made up of masterpieces ranging from the early Renaissance to the second half of the nineteenth century. It is one of the world's major private art collections. While the idea of promoting fine arts for the general good enjoyed its greatest popularity during the Baroque period, the House of Liechtenstein continues to pursue this goal to this day.

At LGT, we take inspiration from the art in the Princely Collections. For us, the collection embodies the values that form the basis of all successful partnerships: expertise, reliability and a long-term focus. Just like the experts who care for the masterpieces, our team of professionals diligently curate the wealth of our clients. By drawing upon this rich heritage, LGT has honed wealth management to an art.

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Our culture is shaped by responsibility and care. We invest meaningfully in our client relationships, our people and their capabilities.

Heinrich Henckel, CEO LGT Wealth Management

A fresh approach

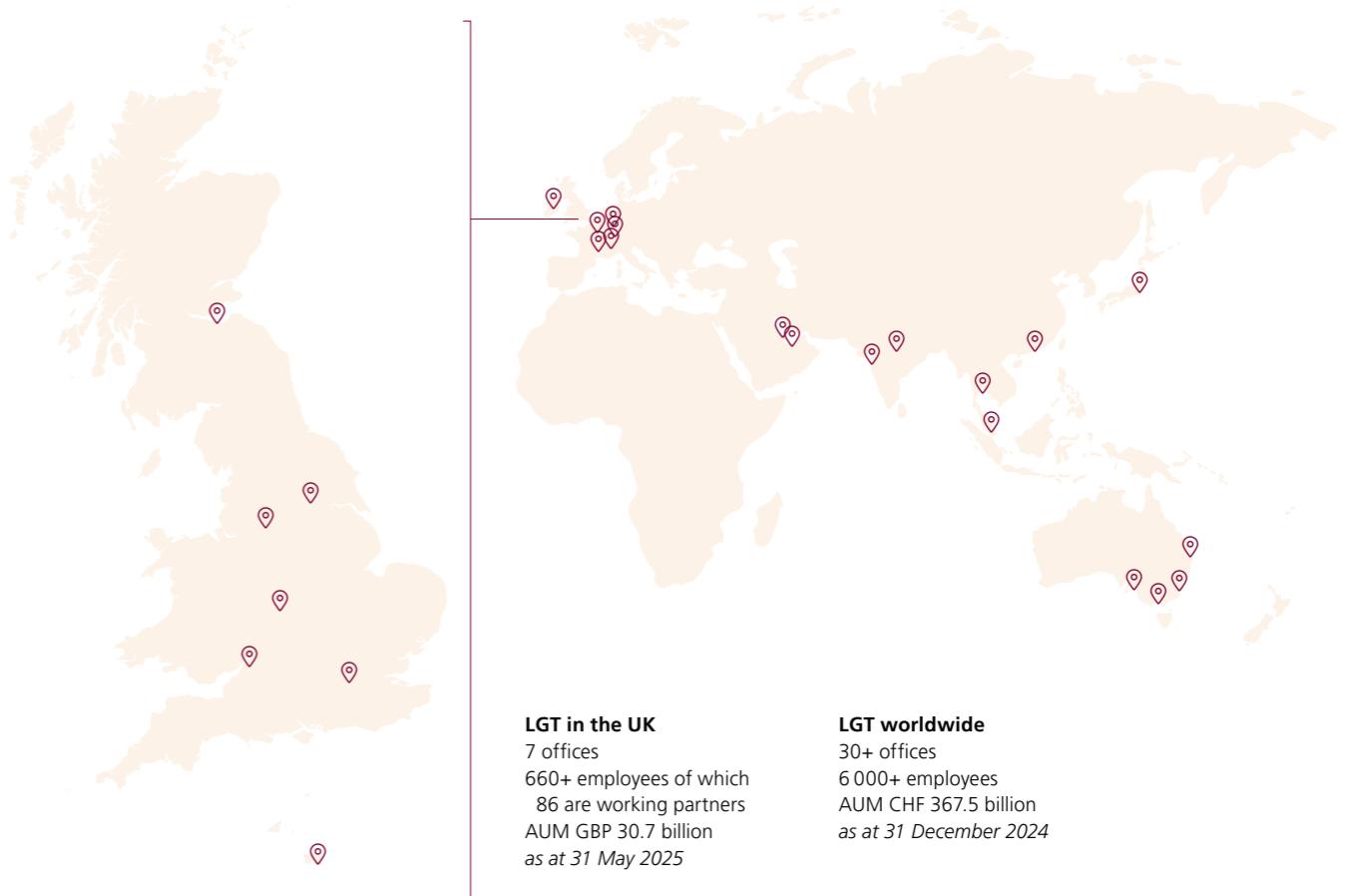
Delivering long-term value for our stakeholders

When our business was founded in 2008, in the midst of the global financial crisis, our aim was to offer a fresh approach to wealth management.

At a time when many financial institutions had become increasingly disconnected from their clients, the plan was simple: place our clients at the heart of our business, providing them with a service designed around what is right for each of them.

Now part of LGT Group, wholly owned by the Principality Family of Liechtenstein, we remain one of the few global wealth management firms in private ownership. Our entrepreneurial roots are coupled with the financial strength and stability that comes with being part of LGT Group. This affords us the flexibility of a long-term outlook, meaning our focus can remain on building lasting relations with our clients and providing a stable environment for our people.

LGT and LGT Wealth Management



Values worth sharing



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We believe sustainability is often neglected, and we regard it as an essential requirement for the successful long-term growth of companies and of society as a whole.

H.S.H. Prince Max von und zu Liechtenstein,
Chairman LGT Group

A place for people from all walks of life: our unique culture and values are what make our company stand out from other firms. We focus on long-term success and stability, rather than short-term profits.

Belonging

As a family-owned business, we offer something unique in the wealth management industry. We celebrate each other's differences and value them accordingly, creating a culture where our people feel that they truly belong. We also recognise the value of investing in our staff, by offering the latest technology, excellent on-the-job training, access to prestigious professional qualifications and mentoring/coaching programmes. Alongside this, our benefits offering includes a generous, non-contributory pension scheme, equal paid parental leave and hybrid working policies. We also consider the wellbeing of our staff a key priority, with access to mental, physical and financial support.

Whether you are applying for your first professional role after your education or an experienced professional, we will ensure you have a place and purpose at LGT.

Integrity

At LGT, we encourage our people to build long-lasting relationships with clients, and offer tailored, high-quality solutions. Unlike many of our competitors, we take a nimble approach and empower our people with the flexibility to adapt and change to each client's needs.

Our mission is to deliver long-term value for our four stakeholders: our clients, our people, our owner and society. As such, we have a range of employee-led committees that champion diversity and inclusion,

philanthropy and sustainability. Our approach to investing is no different: we conduct every single transaction with integrity and thought.

Entrepreneurship

Our business was founded to offer a truly client-centric, people-driven and progressive approach to wealth management; many of our ideas and principles have now been adopted as industry standard. Our entrepreneurial spirit therefore runs deep and allows us to innovate and remain proactive in developing our ideas. We encourage our people to challenge ideas, suggest improvements and remain adaptive to change. We help you achieve your ambitions by offering you the space required to make it happen.

Sustainability

The world is facing major environmental, societal, technological and political challenges. As an investor and investment adviser for capital allocation, we know the important role of the financial markets in contributing to real change. Sustainability has been and will continue to be one of our business' highest priorities.

LGT adopted a sustainable mind-set early on and has created a culture of thinking, investing and conducting business sustainably. Most significantly, we have set a target to become net-zero across our investments and operations by 2030, ahead of many in our peer group and twenty years ahead of the Paris Agreement.

Conviction

As a firm, our people embrace values beyond short-term profit and are not afraid to make decisions that positively set us apart from the crowd. We stand behind each and everyone who chooses to work ethically, responsibly and in a team.

Our management team supports our common goals and ambitions by fostering an environment that allows change and progress to take place. This ethos has allowed us to attract some of the best talent in our industry, drawing together deep knowledge and experience from a diverse range of disciplines.



Aisha Williams

Senior T&D Manager

"I love being part of a firm that actively creates an environment that allows staff to reach their full potential and thrive."



Carol Bent

Head Receptionist

"Our opinion at the firm matters."



Diversity and inclusion

A place to feel included

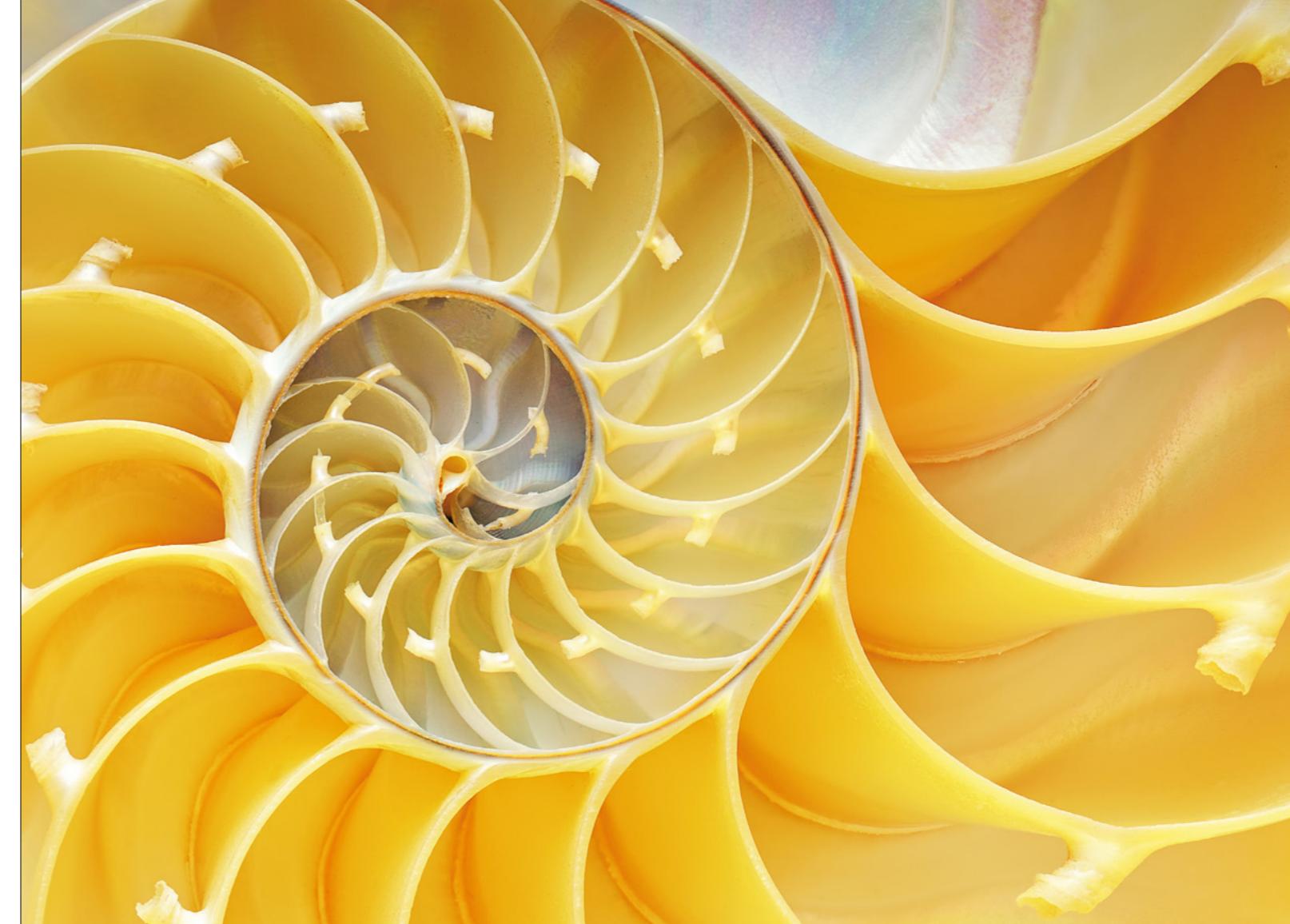
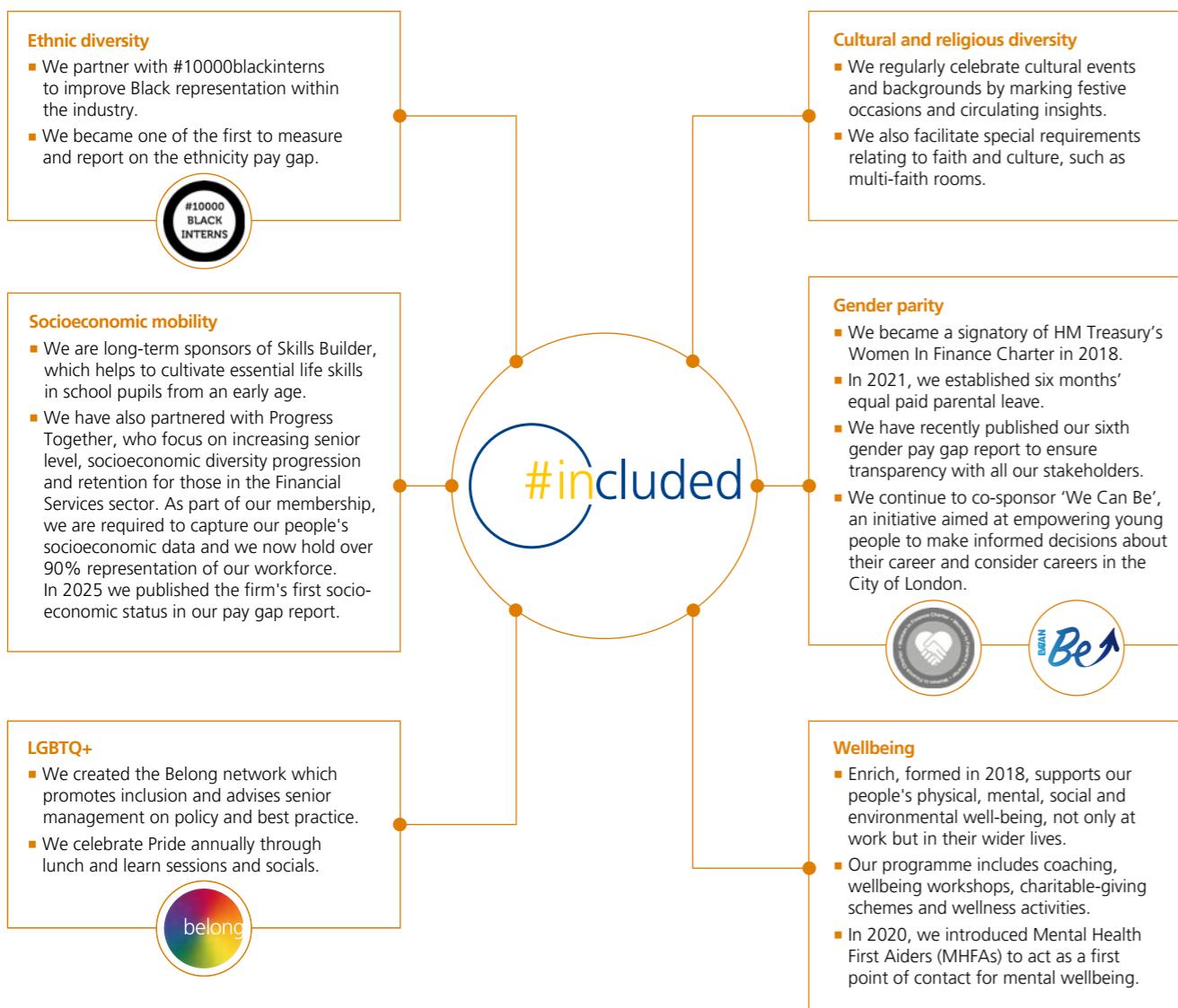
We want to ensure that our people are heard. This is why #included, our award-winning diversity and inclusion initiative, was formed to focus on the opportunities and challenges that surround diversity and inclusion in our workplace.

Awards



- PIMFA Diversity & Inclusion Awards**
Best Organisational Outreach Initiative Programme – Winner 2023
- PIMFA Diversity & Inclusion Awards**
Inclusive Talent Management Award – Winner 2023
- Portfolio Adviser Wealth Partnership Awards**
Contribution to Inclusivity – Winner 2023

Diversity and inclusion programmes



Data and transparency

Collecting data on our people is an important factor in understanding our workforce composition and helps us to identify further areas of diversity and inclusion we wish to address, as well as remaining transparent to our stakeholders. We have published our gender pay gap data for the past six years. In 2022 we were one of the first in the Wealth/Asset

Investment manager sector to voluntarily published our ethnicity pay gap data. In 2025 we were one of only a handful of companies in the country to publish our socioeconomic data.

Our results indicate there is much more work to be done to promote and provide a truly inclusive workplace for our people.



“ Having senior management involved in our #included committee is important because it has allowed us to drive meaningful change across the firm.

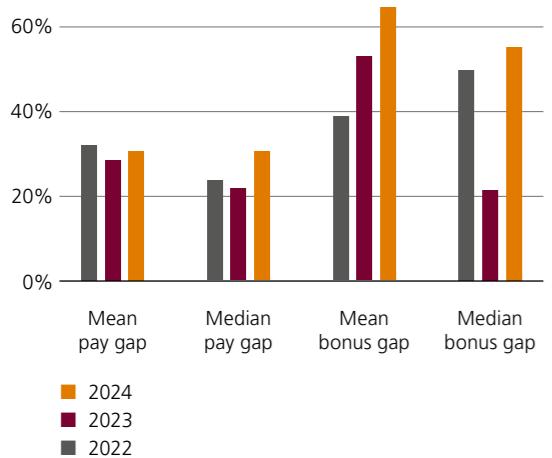
Geraldine Napier-Payne, Head of Central Investments

Gender pay and bonus gap

Whilst we are pleased to see our median pay gap reduce year-on-year, it is regrettable that our mean pay gap figures have not decreased meaningfully. This remains a reflection of the wealth and asset management industry more widely and something we continue to address.

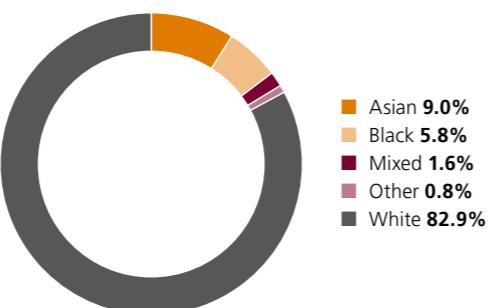
Further detail is available in our Gender and ethnicity pay gap report 2024.

Gender pay and bonus gap



We work with external diversity partners and early careers teams to support our commitment to attract, develop and retain diverse talent.

Ethnicity demographics as of 30 April 2024



Read our Pay Gap Report in full [here](#).

Early careers blind recruitment

A key step to encouraging diversity across the firm is to reduce our unconscious biases at the hiring level. To tackle this, we introduced blind recruitment practices for our graduate, degree apprenticeships and internship programmes in 2022. Our blind recruitment practices are facilitated by a platform call Be Applied and we were recently acknowledged for best in practice with our PIMFA's Diversity & Inclusion Award as 'Best Inclusive Talent Management Programme 2023'.

White and ethnic minority pay and bonus gap (2023)

We have been able to collect ethnicity data from 90% of our people.

Our data illustrates that our UK workforce demographics is overall reflective of our UK population (in alignment to the UK Census 2021). However, when reviewing our pay gap analysis, our ethnic minority population is least represented in our highest paying quartiles. This remains an area of focus for our Firm to ultimately have equal representation across people from all walks of life and backgrounds.

For more on what LGT are doing for diversity and inclusion please see [here](#).



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Diversity is not only the right thing to do, it also reduces groupthink and our intellectual blindspots.



Rav Kallah, Head of Compliance

Sustainability

Forward-looking for generations

We believe that companies wishing to achieve long-term success should consider their impact on the environment and society. We have been working for many years now to further strengthen our commitment to sustainability both in terms of our operations and on the investment side.

In line with this, we offer clients the option of investing in sustainable businesses through their investment portfolio. We have developed a proprietary sustainability rating tool that quantifies the ESG impact of each investment. Good stewardship is also a

key element. We believe collaboration and engagement are a necessary lever for sustainability and contribute to the goals of sustainable investing.

Making a positive contribution to the environment and society through our business activities is also important to us. Our focus on impact has pushed forward our ambitious goals, which focus on sustainability and philanthropy. A minimum of ten percent of LGT Group dividends are allocated to philanthropic activities, to ensure LGT plays its part in building a sustainable future.

Corporate sustainability activities



- Carbon neutral since 2010
- Committed to carbon net zero for the company and own investments by 2030
- Five year plans to review the firm's success on reaching targets
- Investment exclusion includes companies that are involved in coal production and coal-fired power generation, and controversial weapons

- Committed to impact on social ventures
- Partner with Grief Encounter as our charity partner who help bereaved children, young people and their families after the death of someone close.
- LGT offers two days per year for individuals to explore their own personal charity ventures such as volunteering to further advance their individual impact on society
- LGT has dedicated diversity and inclusion/wellbeing committees
- Initiatives do not go unheard thanks to our effective, multifaceted management team
- Focus on governance in the UK and at a global level
- Considering ethics in investing
- Reporting sustainability transparently
- Regularly exercise shareholder voting rights
- Signatory to HM Treasury's Women in Finance Charter

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Having a top-level commitment to sustainability from the Princely Family means we can genuinely integrate sustainability within all our processes.



Siobhan Archer, Global Stewardship Lead

In everything we do, we count on our people to identify with our values. For example, we offer people the opportunity to take two days a year to volunteer and partner with charities to recycle old tech.

Our people can also participate through our Charities Committee to boost LGT's social impact.

For more on what LGT are doing for sustainability please see [here](#).

Sustainability in our business

Business and operations

LGT has made an ambitious commitment to reach net zero by 2030, across both our business operations and our own investments. To do this it is important to take a responsible approach in our day-to-day operations. Our targets include:

- 100% renewable electricity and renewable heating source or district heating

- 90% reduction of Scope 1 and 2 emissions (baseline year 2019)

- 50% reduction of flight emissions per FTE* (baseline year 2019)

- 50% reduction of paper consumption per FTE* (baseline year 2019)

* Full time employee

Awards

LGT has received numerous awards and widespread recognition across the industry, for our fresh approach to wealth management and our forward-looking approach to doing business.



Global Finance Magazine's 2024 Sustainable Finance Awards
Best Bank for Sustainability
Transparency in Western Europe
Winner 2024



Wealth for Good Awards
Best Provider for Philanthropy
Services Globally
Winner 2024



Wealth for Good Awards
Best Private Bank for ESG investing
Winner 2024



International Investment Awards
Excellence in Sustainability
Winner 2024



International Investment Awards
Contribution to Diversity & Inclusion Award
Winner 2024

People and society

As a successful and growing business in the wealth management sector, we believe it is our responsibility to put some of our resource to good use by creating social and cultural added value. There are different ways we do this:

- Volunteering days with our people able to take two days a year for volunteering

- Supporting a core charity through fundraising, volunteering and fund matching as well as additional assistance for satellite charities close to our employees hearts

- Sponsorship of initiatives that drive social development such as initiatives empowering young women and redecorating local youth clubs and community centres

Nature

In 2024, LGT Wealth Management supported a range of sustainability projects, from supporting wetlands creation to tackling e-waste:

- Partnership with the Wildfowl & Wetlands Trust focusing on the Blue Recovery Fund with the ambition to create 100,000 hectares of new and restored wetlands in the UK

- Tackling e-waste created from obsolete devices by partnering with Recomne, offering refurbished IT equipment to foundations, schools, charities equipment generating a positive social impact

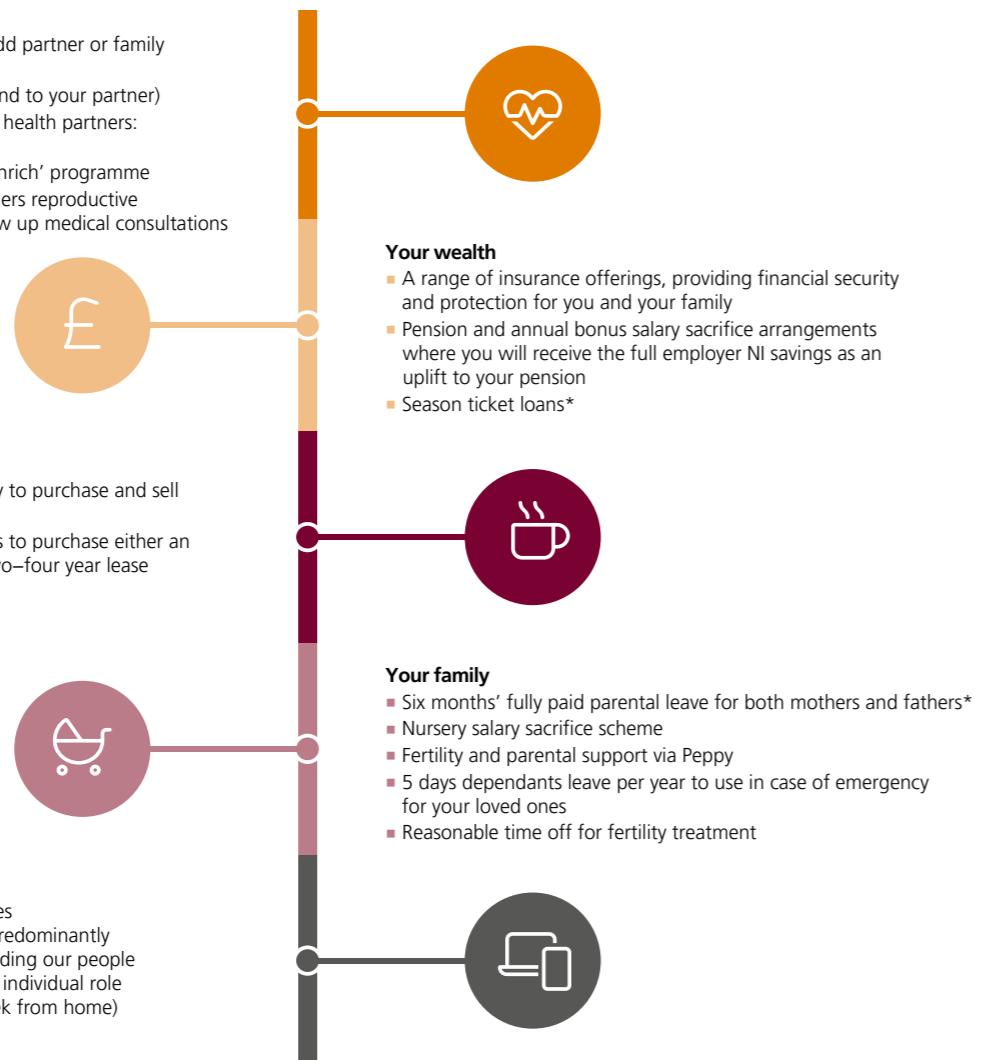
Your benefits, your way

Your benefits pot

Your flexible benefits package has a value to 15% of your basic salary with 9% automatically paid into your Pension. Your remaining 6% pot provides you the flexibility to select from a range of additional benefits, with any remaining 6% being either placed

into your pension or receiving a monthly cash allowance.

In addition, we fund your single cover Private Medical Insurance, Life Assurance and Income Protection. Find out more about your benefit offering below:



* Benefit only eligible after 6 months employment / passing probation period

Career development and progression

The contribution of each individual is crucial to overall success

We promote, and set great store by, knowledge, continuous learning and personal development, which is why we develop our people's professional and social skills in a targeted manner and invest in their individual development.

As well as supporting professional development, we also understand the importance of job security. Being privately owned, by a family that goes back centuries, offers our people reassurance that we are unlikely to be sold. This provides longterm stability not only to our clients but also to our people.

Your development



Support and developmental frameworks

We provide all our people the opportunity to participate in our annual mentoring scheme either as a mentee or mentor*.

We provide all new joiners with induction training, alongside training and competence plans for those in regulated roles.



Professional qualifications and training

LGT will support you to gain professional qualifications where applicable to your role and development.

Internal and external training courses are available for professional and personal development.



Clear progression maps

For each business area, we hold clear and transparent progression maps.

Progression is measured by merit and not tenure.



Development opportunities

At LGT, you will have opportunities to develop your personal and professional skills.

We are supportive of our people exploring alternative career paths within the company.

Professional development is supported through mid-year and annual appraisals.

A great place to work

We have again achieved a "Great Place to Work" certification, this year being placed as a Top 5 employer in the financial services sector. This was awarded by renowned consulting and research institute "Great Place to Work" who use industry led research and proprietary data to evaluate businesses and recognise those which are resilient, successful, sustainable and offer a consistent and positive employee experience

In the external Great Place to Work™ survey, our staff gave outstanding marks in numerous areas such as their assessment of the welcoming culture at the firm, how fairly they feel they are treated and the respect they are given by colleagues and management. 94% (up from 85% in 2020) of our people are proud to work at LGT Wealth Management and 92% (up from 89% in 2020) agree the firm is a "Great Place to Work™". 85% of our people who completed the survey agreed that LGT Wealth Management "is a psychologically and emotionally healthy place to work".



94%

Proud to work at LGT
up from 85% in 2020



92%

Agree LGT is a "Great
Place to Work" up from
89% in 2020



85%

Agree LGT is a psychologically
and emotionally healthy place
to work



What our people say

"LGT provides the platform for all staff to feel they are valued and are part of the LGT family."

"Client focused culture with a good emphasis on employee wellbeing"

"The ability to get involved in activities outside your day job (e.g. #included, Enrich etc.). You can really make a difference to the lives of your colleagues and wider society. I also think you can be yourself and this is celebrated, I do not know other financial intuitions that have this culture."

"The culture is what makes it such a great place to work. I love my job, I love my team and I love the firm as a whole."

"The best place I have ever worked, everyone is both highly capable and a pleasure to work with. There is a real family feel to the firm even though we have grown to c.700 people. Senior people in the business know who you are and take time out to speak to you (very rare from what I hear about other places)."



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We understand the importance of culture, upholding and celebrating our values and always prioritising the human element of work especially as the world shifts.

Jo Shackleton, Partner and Head of Human Resources

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Investors should be aware that past performance is not an indication of future performance, the value of investments and the income derived from them may fluctuate and you may not receive back the amount you originally invested.

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