



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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We want to create
a work environment
in which people
don’t get the
Sunday night fear.

Ben Snee, CEO LGT Wealth Management

A fresh approach

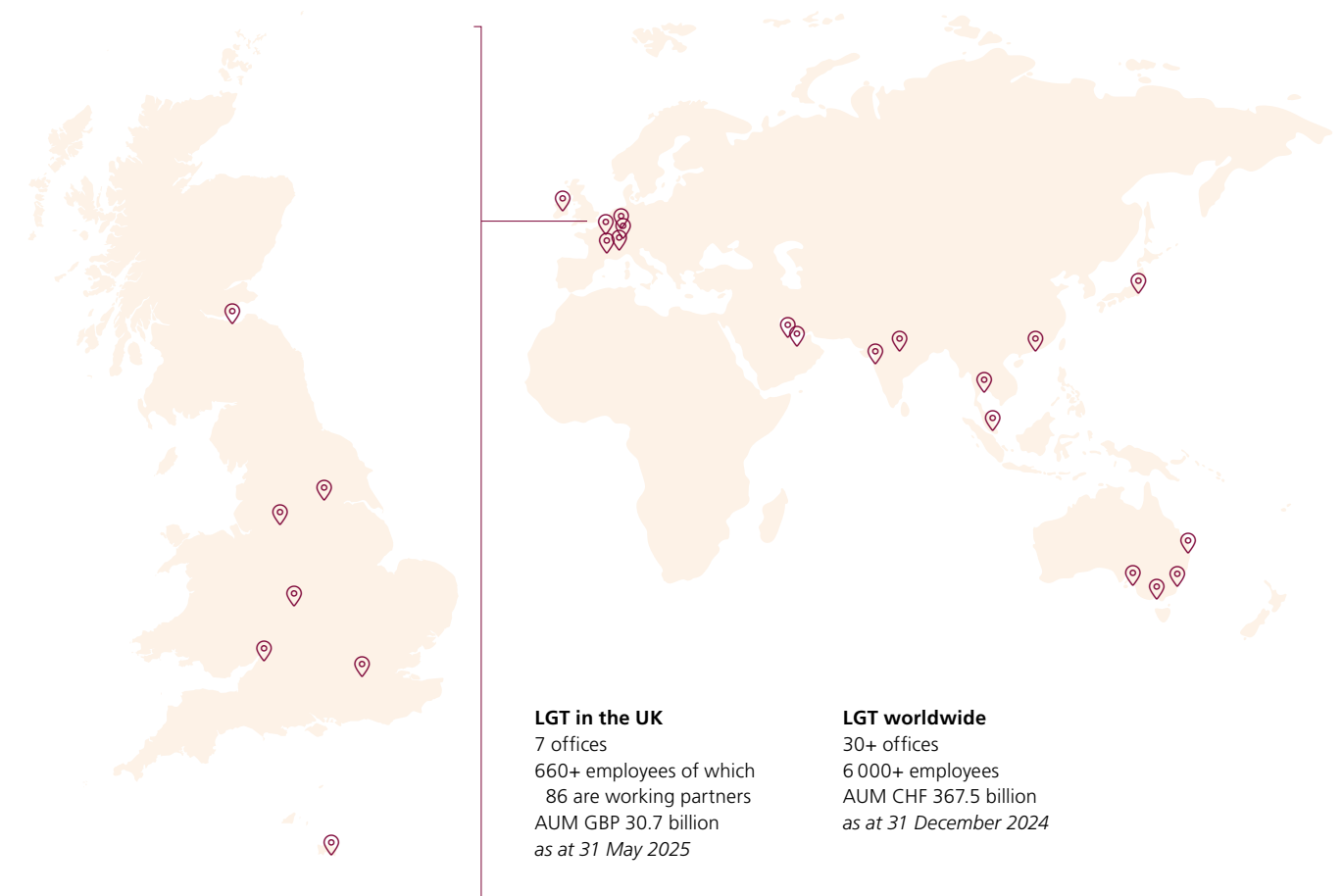
Delivering long-term value for our stakeholders

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 Princely 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





“
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

Values worth sharing

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

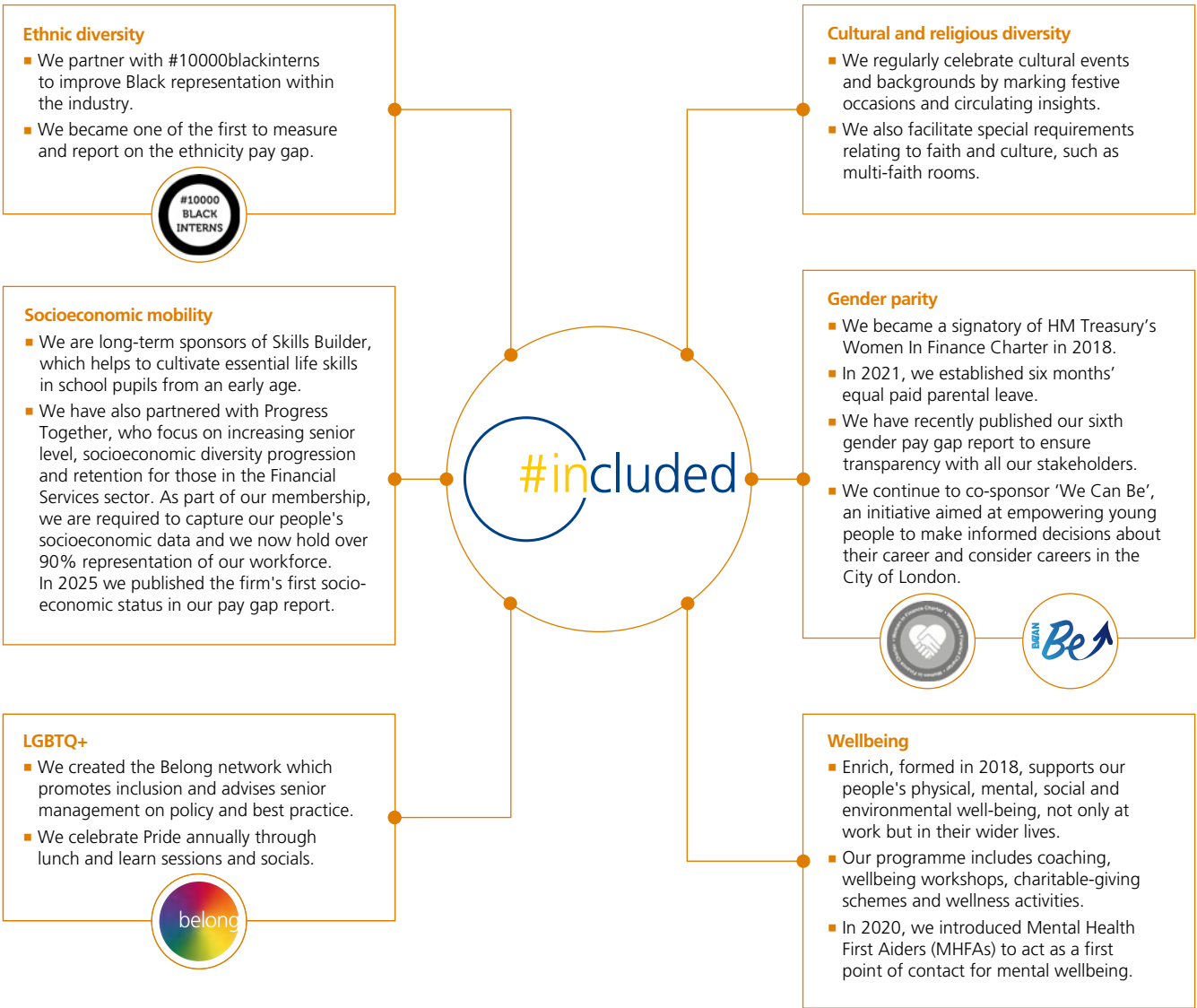
Inclusive Talent Management Award – Winner 2023



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

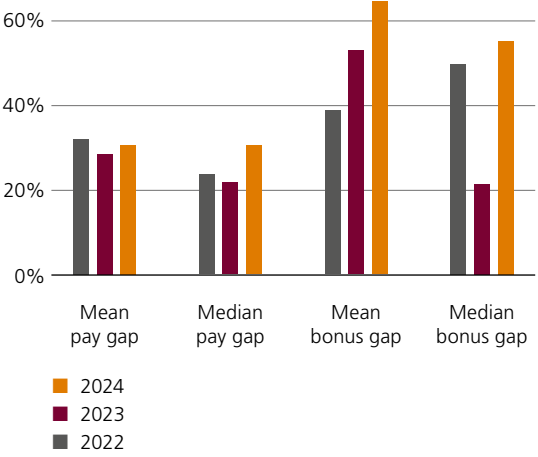


Gender pay and bonus gap

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



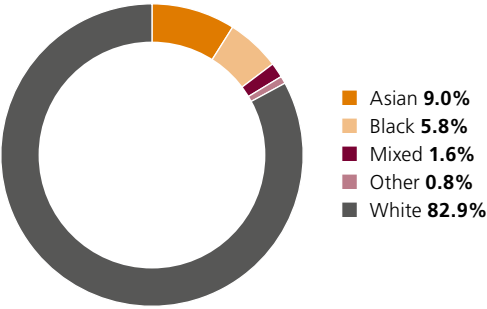
White and ethnic minority pay and bonus gap (2023)

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.

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'.

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



“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



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:

Your benefits

Your health

- Private medical core benefit (ability to add partner or family through 6% pot)
- Health assessments (with option to extend to your partner)
- Additional health support via our digital health partners: Aviva and Peppy
- Access to wellbeing resources via our 'Enrich' programme
- Hertility, understand yours or your partners reproductive health with tests, assessments and follow up medical consultations

Your leisure

- 30 days holiday per year, with the ability to purchase and sell holidays up to 35 days per year
- Car salary sacrifice scheme, with options to purchase either an electric, hybrid or traditional car on a two–four year lease
- Cycle to work scheme*
- Technology purchase scheme*

Your work

- Hybrid and flexible working opportunities (Whilst we expect our people to work predominantly in the office, we are committed to providing our people the opportunity to work from where an individual role allows, working up to two days per week from home)

Your wealth

- A range of insurance offerings, providing financial security and protection for you and your family
- Pension and annual bonus salary sacrifice arrangements where you will receive the full employer NI savings as an uplift to your pension
- Season ticket loans*

Your family

- Six months' fully paid parental leave for both mothers and fathers*
- Nursery salary sacrifice scheme
- Fertility and parental support via Peppy
- 5 days dependants leave per year to use in case of emergency for your loved ones
- Reasonable time off for fertility treatment

* 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)."



“
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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Important information

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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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