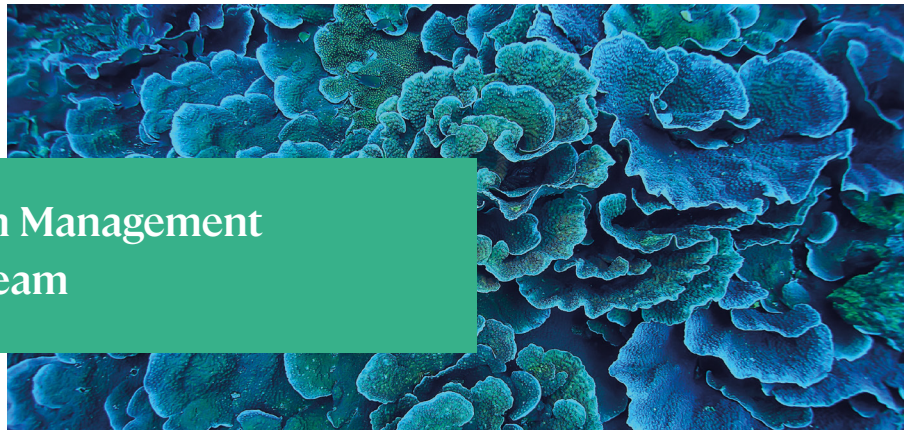
Wealth Management



LGT Wealth Management Charities Team

An experienced partner for your charity

For over 20 years, our specialist Charities Team has been investing responsibly for charities, foundations and endowments; delivering strong investment outcomes through portfolios that align with our clients' values and seek to positively benefit people and the planet. The team manages approximately GBP 2bn on behalf of UK charities.

We are a fast growing team, delivering the global resources of LGT Group, Europe's largest private bank and asset manager owned by a single family, in tailored, high-performing investment solutions. We offer a range of segregated or pooled solutions alongside treasury management, portfolio lending and access to the private asset and impact investing capabilities of LGT Group.

As responsible investors, and active members of the UNPRI, our investments approach and our actions as a company are leading the way to a more sustainable future.

How we invest - profit with purpose

Our investment approach sets out to identify those truly great companies that are positioned for long term growth in an ever changing world. Leading companies, that are ambitious and credible in the way they address global challenges, are more likely to sustain their growth and performance in future.

A range of solutions to meet your needs

Our portfolios are constructed to meet a charity's individual objectives and can adjust and evolve as requirements change over time. We provide a powerful range of screening options to meet our clients' unique ethical and sustainability objectives.

We also offer our investment capabilities through a range of collective ESG focused funds that have been developed in partnership with Charities Aid Foundation (CAF).

LGT Group - Key figures (as of 30 June 2026)

CHF 412.6bn
Assets under management

6000+
employees

40+
locations worldwide

20+ year
Charity performance track record

10%
of the groups annual dividend granted to **charitable causes**

Sustainability is at the heart of our business

Climate Action 100+

Nature Action 100

FAST FINANCE AGAINST SLAVERY & TRAFFICKING

Great Place To Work. Certified

Investment approach

We invest directly in high-quality companies across the globe: reducing costs and increasing transparency for our investors.

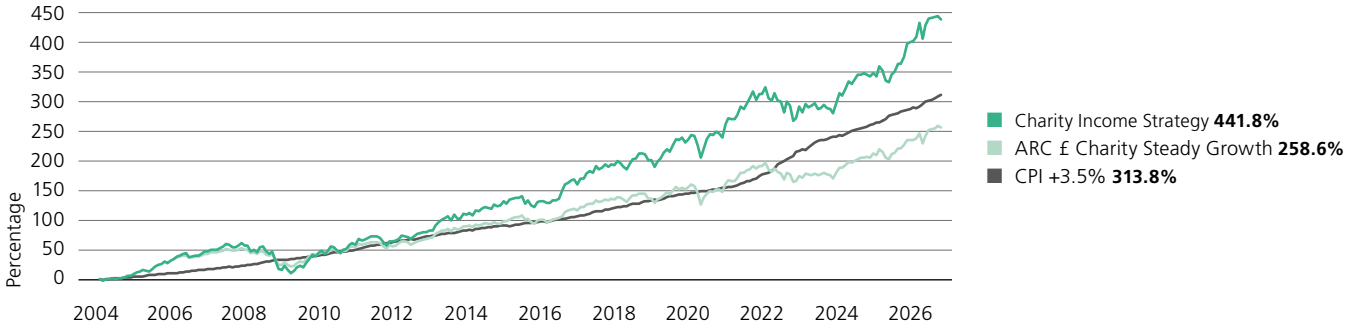
We focus on the future, identifying companies that are supported by the structural trends that are shaping our world.

ESG factors are financially material to company performance. Integrating ESG analysis leads to better investment decisions.

Informed and constructive engagement helps foster better companies, enhancing the value of our clients' investments.

Identifying companies which provide solutions to global challenges, provides a rich set of opportunities to drive returns.

High performing portfolios - focused on the long term - charity income strategy



Source: LGT Wealth Management

Performance 30 September 2026	2019	2020	2021	2022	2023	2024	2025	3yrs Annualised	5yrs Annualised	10yrs Annualised
Charity Income Strategy	**18.3**	**8.3**	**14.2**	**-10.2**	**8.5**	**7.1**	**13.3**	**11.7**	**6.0**	**7.3**
ARC £ Charity Steady Growth	15.7	3.6	12.3	-9.6	7.5	8.2	9.3	10.2	5.0	5.9
CPI +3.5%	4.8	4.1	9.1	14.4	7.6	6.1	7.0	6.4	8.0	6.3

Source: LGT 30 September 26. LGT Charity Income Strategy is net of Management fee (0.54%).
ARC Steady Growth Index launched in January 2006, performance prior to inception aligned to LGT proposed strategy for comparative purposes.
Calendar year performance is from 1 January to 31 December. Annualised performance is to 30 September 2026.

The performance figures may vary due to product-specific changes and should be viewed on an indicative basis. Portfolio performance figures are based on model portfolios and should be considered as a representative performance. The actual client performance might differ due to the make-up of each individual portfolio. The value of an investment can fall as well as rise and is not guaranteed. An investor may get back less than they put in. Past performance is not a guide to future performance. All data as at 30 September 2026. The figures shown here refer to the past.

How to get in touch
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lgtwm.com/uk-en/charities/

Find out more from our Charity Resource Hub

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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.