Wealth
Management

Private Office

A well-run company has a clear view of the road ahead. Shouldn't a family have the same?

A look inside the Princely Collections
For more than 400 years, the Princes of Liechtenstein have been passionate art collectors. The Princely Collections include key works of European art stretching over five centuries and are now among the world's major private art collections. The notion of promoting fine arts for the general good enjoyed its greatest popularity during the Baroque period. The House of Liechtenstein has pursued this ideal consistently down the generations.
We make deliberate use of the works of art in the Princely Collections to accompany what we do. For us, they embody those values that form the basis for a successful partnership with our clients: a long-term focus, skill and reliability.

www.liechtensteincollections.at

Cover image: Peter Fendi, detail from "The song of the bell 'Hail Mary'", 1833

Contents

Welcome to LGT Wealth Management Private Office

Welcome to LGT Wealth Management Private Office. We are a multi-disciplinary team enabling clients with complex needs to outsource their Family Office activities. The depth and breadth of the service delivered by our experienced team, ensures we go beyond investment decisions to address the full range of your family's requirements.

Originally founded in 2008, we are a UK based wealth management firm and part of LGT, the largest family owned private bank in the world, owned by the Princely Family of Liechtenstein. Our private ownership enables us to take a long-term approach to business decisions, whilst our business structure ensures we are able to maintain a personalised relationship with you.

Our values as a team are shaped and defined by our cornerstones; client-centric, impartial, expertise and integrity. Empowering you to realise your unique aspirations is the objective of our relationship.

Yours sincerely,

Ben Chance
Partner and Head of Private Office,
LGT Wealth Management

About us

Our Private Office delivers a fully outsourced Family Office service to go beyond investment decisions and address the full range of your family's needs. Made up of professionals with wide-ranging backgrounds from accounting to investment banking and law, our team offers a genuinely holistic and highly distinctive service. Think of us as an outsourced Family Office, one that is fully dedicated to serving you and the people you most care about.

We believe – and experience confirms this – that offering a service in the round relieves the burden on family members dealing with issues as diverse as investment and legacy planning. We help add structure and clarity to family affairs, when often the fact that there are several stakeholders with divergent interests and priorities leads to overwhelming confusion and complexity.

As ever, our team works collaboratively with each other and with you to bring decades of experience to bear across the four key areas of our service: Family Office services, investing, illiquid assets and wealth planning. We present you with honest, actionable advice to help you both deal with the day-to-day and plan with confidence for the long term.

We also recognise the globalisation of our client base and the need to support and simplify the complexities of multi-national and multi-generational wealth. We therefore work with trusted partners across a range of specialisms, and are well versed in collaborating with our clients' existing advisers.

Our philosophy

Our focus is on ensuring we meet and exceed your expectations. We provide a cost effective and flexible alternative to you maintaining your own Family Office.

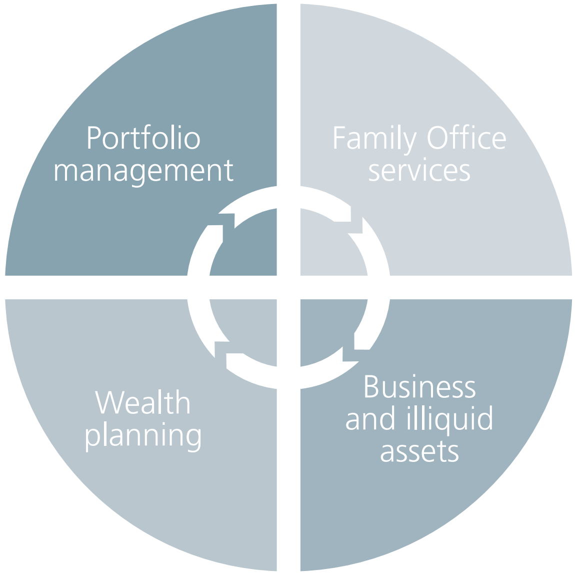
Integrity runs through everything we do. We continuously strive to reduce the opaqueness of the investment industry. We believe that many overly complex investments rarely deliver positive outcomes for clients.

We work hard to ensure we deliver our services in a clear, simple and transparent manner. We do this in four key areas, shown opposite:

Key areas of focus

- Investment strategy
- Discretionary
- Advisory
- Portfolios for US Nexus clients*

- Consolidated reporting
- Project management
- Portfolio analytics
- Liquidity planning
- Next generation engagement



- UK planning
- Inter-jurisdictional planning
- Cross-generational planning

- Advising entrepreneurs on strategic options and exit
- Access to private deals
- Private equity
- Debt raising

* These services are provided by our specialist subsidiary, LGT Wealth Management US.

Portfolio management

Portfolio management

- Investment strategy
- Discretionary
- Advisory
- Portfolios for US Nexus clients*

We take account of our clients' existing investments, non-financial assets and long-term objectives whilst always remembering that not all inputs are quantifiable. The better we understand you, the better we can deliver your objectives. In doing so, we bring institutional capability and process to a private client environment which we know delivers better results in the long term.

Our core principles:

- We tailor all our portfolios based on the unique requirements and preferences of our clients. All accounts are segregated and can be invested on a multi or single-asset basis.
- We provide institutional capability and process to a private client environment.
- We invest globally, using both traditional and alternative investments across a range of currencies, directly and through funds.
- We are impartial and aligned with our clients' interests.
- We aim to provide strong and consistent risk adjusted returns over the medium and longer term, all with a focus on capital preservation and stringent risk reduction.

* These services are provided by our specialist subsidiary, LGT Wealth Management US.

Family Office services

- Consolidated reporting
- Project management
- Portfolio analytics
- Liquidity planning
- Next generation engagement

Family Office services

Our Family Office services encompass a family's entire wealth. We work with holding structures, illiquid investments and privately held businesses, while paying particular attention to overall long-term wealth strategy and family dynamics.

We facilitate both intermittent and ongoing planning across a range of areas. These key areas include:

- Consolidated reporting across all in-house and third party investment portfolios as well as illiquid assets such as property and art.
- Cash flow and balance sheet modelling to outline future scenarios and liquidity requirements.
- The preservation and transfer of wealth; working on your legacy and educating the next generation.
- Coordination of advisers and project management.

Business and illiquid assets

- Advising entrepreneurs on strategic options and exit
- Access to private deals
- Private equity
- Debt raising

Advising business owners and entrepreneurs

As entrepreneurs ourselves, we understand the support business owners require and are ideally placed to provide our expertise to our clients throughout their own entrepreneurial journey. We endeavour to impress the importance of personal planning and family considerations from the outset of business development to ensure exit is strategically optimised for the individual as well as their business.

Illiquid assets

We work with large, sophisticated and global clients and their investment needs increasingly span far beyond traditional investment markets. We facilitate:

- Access to private deals; sourcing and introducing opportunities in private growth companies across sectors, directly to individually selected investors of relevance.
- Private equity; a bespoke offering of both blue chip and niche specialist funds.
- Debt raising; helping you or your business access debt capital, however niche, by accessing mainstream and alternative lenders.

Wealth planning

- UK planning
- Inter-jurisdictional planning
- Cross-generational planning

The structuring of your assets, taking into account your immediate and future family needs and goals, underpins everything we do, in tandem with the investment of your assets. We advise clients and associated companies, partnerships and trusts that are resident and/or domiciled in the UK, as well as truly international families. We believe, from experience, that planning how to invest optimally is best done earlier rather than later.

Our team includes two STEP* Diploma qualified experts who can advise on both local and international issues, always taking the long-term view and integrating the investment management of the assets. Whilst we do not provide formal tax advice, we are well versed in assisting our clients in this area and can work closely with existing advisers or introduce our trusted partners.

Our service includes advice in the following areas: retirement planning and pension aggregation, life assurance, inheritance tax planning and devolving wealth to future generations, providing for school fees, cross-border planning for international families.

* The Society of Trust and Estate Practioners

Friedrich von Amerling, detail from "Portrait of Princess Marie Franziska von Liechtenstein (1834–1909) at the age of two", 1836

Important information

"Providing you with a single source of trusted, impartial advice across generations is both our responsibility and our privilege."

Ben Chance, Partner and Head of Private Office,
LGT Wealth Management

LGT Wealth Management
14 Cornhill, London, EC3V 3NR
Phone +44 (0)20 3207 8000, info-uk@lgt.com

www.lgtwm.com

VALUES WORTH SHARING

0118 1T PP