



## A Fresh Approach

LGT Wealth Management is part of the private banking and asset management group LGT, owned by the Princely Family of Liechtenstein. We challenge convention in our industry by offering a transparent wealth management service built around each client's needs.

### Our Approach

Our entrepreneurial approach, together with the LGT Group's stability, enables us to make decisions that we believe will provide long-term benefits for our clients. This flexibility allows us to tailor our business model to suit our vast range of client types and the unique requirements that they have, be it private clients, institutional clients, financial intermediaries or international clients.

### Our philosophy

#### Entrepreneurial

When we set up the business in 2008, our aim was to offer a fresh approach to wealth management. The plan was simple: put our clients first by providing a transparent service, designed around what is right for them. Since founding our business, we have turned our vision into a reality, attracting some of the best talent in the industry and drawing together in-depth experience across multiple asset classes.

#### Stability

Our service to you is far from just investment performance and financials, but it is important to know that you are in safe hands. The LGT Group has one of the strongest balance sheets in the industry, with high levels of liquidity and an equity capitalisation significantly above regulatory requirements. LGT Bank has a credit rating of A+ Standard & Poors and Aa2 Moody's (as at 31 December 2021).

LGT Group has over CHF 285 billion in assets under administration, with group profit at CHF 352.8 million, and more than 3,900 employees in over 20 locations worldwide, as at 31 Dec 2021.

LGT Wealth Management has over £21.4 billion in assets under management and 425 members of staff, of whom 72 are partners, as at 31 January 2022.

### LGT Wealth Management Jersey Limited

In order to cater for clients requiring an offshore investment service, we established a 100% owned subsidiary in 2008 with a full physical presence following in 2010. Since then, the well-established team has grown and benefits from the addition of long standing, experienced investment managers who are known in the local market as well as internationally. The team in Jersey has extensive experience in managing assets for private clients, fiduciaries, charities and both local and international pension schemes.

### Our Services

Our clients can choose how much involvement they have with the management of their investment portfolios.

#### Discretionary Portfolio

Our Discretionary Portfolio Management Service is appropriate for clients who wish to delegate all investment decisions to us. Our investment process defines the structuring of these portfolios, with the day to day management looked after by each client's Investment Manager.

### **Advisory Portfolio**

Our Advisory portfolio management service is for clients who wish to become more involved with the investment strategy and with all decisions made on their portfolio. The Investment Manager will have an understanding of each client's objectives and levels of risk, and will communicate investment ideas to meet these objectives. However, no transactions will be executed without the prior agreement and instruction from the client.

### **Private Client Broking**

We understand that each person has their own unique financial goals and circumstances. With that in mind, our highly experienced team of private client stockbrokers provide a professional and bespoke investment management service, advising on a diverse range of securities listed on most of the world's main stock markets.

### **What makes us different?**

- We value each of our clients and put their interests at the heart of our business
- We are transparent with our fees and in our investment recommendations
- We do not believe in jargon and try to communicate in the way which all our clients understand
- We continue to search for ways to improve our service

### **LGT Wealth Management Jersey Limited**

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### **Important information**

LGT Wealth Management Jersey Limited is regulated by the Jersey Financial Services Commission. Our registration details are set out in the JFSC Register: Firm Reference No: IB0263 [www.jerseyfsc.org/investment\\_business/regulated\\_entities/index.asp](http://www.jerseyfsc.org/investment_business/regulated_entities/index.asp). Registered in Jersey: 102243. Registered office: Charles Bisson House, 30-32 New Street, St. Helier, Jersey, JE2 3TE. This publication is marketing material. It is for information use only. The wording contained in this document is not to be construed as an offer, advice, invitation or solicitation to enter into any financial obligation, activity or promotion of any kind. You are recommended to seek advice concerning suitability from your investment advisor. Any information herein is given in good faith, but is subject to change without notice and may not be accurate and complete for your purposes. The document is not intended for distribution to, or use by, any individual or entities in any jurisdiction where such distribution would be contrary to the laws of that jurisdiction or subject LGT Wealth Management Jersey Limited to any registration requirements.