



Mutual interests

A partnership built on trust
and service

Specialist investment management

We offer specialised investment management services tailored specifically for institutional clients, with a strong emphasis on Friendly Societies and Financial Mutuals. Our aim is to provide you with expertise, financial stability and continuity of service.

Tailored to you

At the core of our approach is the recognition that no two Mutuals are the same. We believe everything starts with you and your unique needs.

Our specialist advice is based on gaining an intimate understanding of your organisation, regardless of its size. We know that every Mutual has distinct financial objectives, risk attitudes, solvency capital considerations and income requirements. For our regulated institutional clients, we offer both segregated and pooled solutions to cater to your specific needs.

In-house expertise

We have one of the longest track records supporting the sector and, through our extensive existing relationships, have a deep understanding of your business requirements.

Our team brings in-house expertise across various disciplines, including equity, alternatives and fixed income investment management. These areas demand specialised knowledge, and our team of experts works together, closely integrated with our investment committees, to deliver a cohesive approach.

Partners in your long-term success

A friendly approach is what sets us apart. Jacqueline, James and the wider team have years of experience providing bespoke investment services to this sector. We are committed to being here for the long term, working alongside you and your actuary to fully understand the scope of your investment needs. With this

Institutional team overview

- £ **£1.5 billion team assets under management**
-  **Access to our specialist investment sub-committees**
-  **Investment Committee with an average of 20 years investment experience**
-  **Industry-leading investment research and analysis**
-  **Medium to long-term stable investment returns**

understanding, we create bespoke portfolios that are dynamic and adaptable to the ever-changing world.

Every detail, expertly managed

Behind the portfolios, we offer comprehensive reporting and operational support. We will work with you to develop bespoke reports tailored to your needs, including Solvency II reporting and risk management.

Sustainability: more than financial returns

Our commitment to sustainability is central to our business. We invite you to scan the QR code for our annual Sustainability Report:



Financial 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.

Financial highlights of LGT Group

	GBP
Assets under administration	376.0 billion
Equity capital	5.1 billion
Group profit	256.6 million
Tier 1 ratio	18.0%

30 June 2026

Independent review

We would be pleased to review your arrangements – an entirely independent and cost-free 'temperature-check', offered with no obligation on your part. This is an ideal opportunity to receive an unbiased perspective on your current setup and potentially identify areas for improvement.

Please let us know if this is something you would be interested in, and we can arrange a suitable time for the review.

We look forward to the opportunity to work with you and help you achieve your financial goals.

Contacts

Jacqueline Crawley, Partner, Head of Institutional Relationships
Phone +44 (0)203 207 8110, Mobile +44 (0)7506 217 502
jacqueline.crawley@lgt.com

James Arumainayagam, Partner
Phone +44 (0)203 207 8446, Mobile +44 (0)7852 852 920
james.arumainayagam@lgt.com

Important information

LGT Wealth Management UK LLP is authorised and regulated by the Financial Conduct Authority Registered in England and Wales: OC329392. Registered office: 14 Cornhill, London, EC3V 3NR.

LGT Wealth Management Limited is authorised and regulated by the Financial Conduct Authority. Registered in Scotland number SC317950 at Capital Square, 58 Morrison Street, Edinburgh, EH3 8BP.

LGT Wealth Management Jersey Limited is incorporated in Jersey and is regulated by the Jersey Financial Services Commission in the conduct of Investment Business and Funds Service Business:102243. Registered office: Sir Walter Raleigh House, 48-50 Esplanade, St Helier, Jersey JE2 3QB.

LGT Wealth Management US Limited is authorised and regulated by the Financial Conduct Authority and is a Registered Investment Adviser with the US Securities & Exchange Commission ("SEC"). Registered in England and Wales: 06455240. Registered Office: 14 Cornhill, London, EC3V 3NR.

This publication is marketing material. It is for information purposes only. Certain services described herein are not available to retail clients as defined by the FCA or the JFSC, as applicable; please speak to your investment adviser for further clarification in this regard.

All services are subject to status and where local regulations permit. 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 adviser. 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. This 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 any LGT Wealth Management entity to any registration requirements. When we provide investment advice it is on the basis of a restricted approach where we consider a restricted range of products or providers rather than assessing the whole market.

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.