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Friendly Societies and Financial Mutuals

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

We are committed to working with Friendly Societies and Financial Mutuals, offering specialist advice and services to meet your investment requirements.

Key to our approach is a thorough and well informed investment process, transparent charging and clear reporting. We have access to the resources and expertise of leading global investment houses whilst offering a highly personalised service typical of smaller niche firms.

We consider the individual needs of each Society and tailor our active investment approach to meet your specific requirements.

We seek to build long term relationships based on performance, service and integrity ensuring your Board understands our strategy and direction and that we understand your objectives and investment parameters.

We are proud to be an Associate Member of the Association of Financial Mutuals.

Service and key features

- Experienced Friendly Society team with whom you have a direct relationship
- Active management of both fixed interest and equity stocks as distinct disciplines, however with a cohesive investment approach
- Integrated cash management
- Strong risk management disciplines
- Bespoke portfolio solutions as we recognise each Society has different requirements
- On-going advice on strategic asset allocation
- Liability matching, working closely with your Actuary
- Solvency II compliant investments
- Transparent reporting together with on-line access to your portfolio
- Robust research facilities which focus on fixed interest, equities, collectives and alternative investments
- Competitive and transparent all-inclusive fee structure
- On-going dialogue and regular review meetings
- Working in partnership with your Society for the benefit of your Members

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