Wealth
Management

Mutual interests

A partnership built on trust and service

Fully tailored investment management services, specialising in providing advice to Friendly Societies and Financial Mutuals.

Forward-looking
for generations

Specialist investment management

No two Mutuals are the same. We believe that everything we do should start with the client and their needs.

Tailored to you

The specialist advice we offer is based on gaining an intimate knowledge of your organisation, however large it may be. We understand that every Mutual has individual financial objectives, risk attitudes, solvency capital positions and income requirements. For our regulated institutional clients, we also offer pooled solutions.

In-house expertise

We know that equity, alternatives and fixed income investment management are very different disciplines and therefore require particular expertise. Our team has specialists in each asset class working together to deliver a cohesive approach.

A Friendly approach

We have many years of experience in providing bespoke investment services to Friendly Societies and Financial Mutuals.

Your dedicated team will work with you and your actuary to ensure that we fully understand the scope of your investment needs. It is with this understanding that we then create your bespoke portfolio.

Institutional team overview

- **£1.5billion 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**

Behind the portfolios

Reporting and operational support

We will work with you to determine the reporting requirements that fit your business model and needs – from Solvency II reporting to risk management.

Our commitment to Sustainability

Sustainability sits at the heart of our business. Our annual ESG Impact report is available by scanning the QR code below.

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.

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.

Financial highlights of LGT Group

	GBP
Assets under administration	313 billion
Equity capital	5 billion
Group profit	154 million
Tier 1 ratio	19%

30 June 2024

Ratings for LGT Bank Ltd

	Rating
Moody's	Aa2
Standard & Poor's	A+

30 June 2024

Important information

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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.

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