



## Unbiased Advice

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 Wealth Planning team is dedicated to the provision of comprehensive financial planning advice to individuals, companies, partnerships and trusts.

### About Wealth Planning

Our comprehensive financial planning approach helps ensure your ambitions remain on track. We work with you to create a bespoke financial plan, designed around your individual needs, offering long-term guidance. We will consider the whole of the market in order to find the best financial planning solutions for you. Our decision not to manufacture our own products ensures our advice is unbiased.

### Key to our approach is:

1. A trusted relationship between you, your planner and your paraplanner.
2. An in-depth knowledge of your aspirations, your family and your business.
3. Analysis of your lifetime cash flow, your attitude to risk, the impact of not fulfilling your financial needs, the affordability of proposals.
4. The aggregation of your financial plans.

### Services

#### Our service includes advice to you in the following areas:

- Cash flow analysis
- Psychometric risk profiling
- Retirement planning
- Pension aggregation
- Income tax planning
- Inheritance tax planning
- Protection for death
- Business protection
- Protection for illness
- Savings
- Long-term investments
- School fees
- Offshore and international planning for non-domiciled and non-resident clients.
- Specialist services for US connected clients
- Venture Capital Trust, Enterprise Investment Scheme & Business Property Relief advice

### Key Features

- Experienced professionals providing unbiased and impartial advice
- Access to the whole investment market
- Asset allocation based on your specific appetite for risk and return expectations
- Maximising the efficiency of your tax position
- High level of service and support to you at all times
- Clear and transparent reporting
- Competitive and transparent fees

## **LGT Wealth Management**

14 Cornhill  
London  
EC3V 3NR

Phone +44 (0)20 3207 8000  
info-uk@lgt.com, www.lgtwm.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: SC317950. Registered office: 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: 30-32 New Street, St Helier, Jersey, JE2 3TE.

LGT Wealth Management International Limited is registered in Jersey and is regulated by the Jersey Financial Services Commission under the Financial Services (Jersey) Law 1998 (as amended) for the conduct of investment business and fund services business: 38918. Registered Office: 1st Floor, Sir Walter Raleigh House, 48-50 Esplanade, St Helier, Jersey JE2 3QB.

LGT Wealth Management (CI) Limited is registered in Jersey and is regulated by the Jersey Financial Services Commission: 5769. Registered Office: at 1st Floor, 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 that is to say, whilst we review and advise on retail investment products from the whole of the investment 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.