LGT Wealth Management

Key Facts

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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.

Key Features

- Customised financial advice across all asset classes
- Experienced investment professionals from some of the world’s leading financial institutions
- Assets held on a client’s behalf are held separately and ”ring-fenced”
- Asset allocation based on clients’ specific risk and return profitability and modern portfolio theory
- Access to the best investment opportunities and managers across all asset classes
- Ability to advise on strategies which will enhance net returns through appropriate tax planning
- High level of service and support to clients at all times
- Clear and transparent reporting and best execution
- Competitive and transparent fees

Services

- Multi-asset class portfolio management
- Single-asset class portfolio management
- Wealth planning – estate planning, capital gains and income tax planning
- Alternative investments
- Cash management
- Foreign exchange products
- Structured products
- Pensions
- Offshore and international planning for nondomiciled and non-resident clients
- Direct and indirect security investments
- ISA management
- Portfolio management for institutional clients, charities, trusts, companies and financial intermediaries
- Ethical investments

LGT Wealth Management UK LLP
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. Our regulation details are set out in the FCA register: Firm Reference No: 471048; register.fca.org.uk/. Registered in England and Wales: OC329392. Registered office: 14 Cornhill, London, EC3V 3NR.

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. Registration number: 102243; www.jerseyfsc.org/industry/regulated-entities, Registered office: 30-32 New Street, St Helier, Jersey, JE2 3TE

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"). Our regulation details are set out in the FCA register: Firm Reference No: 585547; register.fca.org.uk/ and the SEC Investment Adviser Public Disclosure: www.adviserinfo.sec.gov/IAPD/Default.aspx. Registered in England and Wales: 06455240. Registered Office: 14 Cornhill, London, EC3V 3NR.

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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.