Wealth
Management

A fresh approach to wealth management

Forward-looking
for generations

We provide trusted, long-term advice for your wealth needs

Thank you for considering us. We understand that selecting a wealth manager is an important decision, which is why we focus on building enduring, one-on-one relationships that give you clarity, confidence and peace of mind so you can focus on what matters most.

We work closely with our clients and their families at pivotal moments, whether they are navigating retirement, planning to exit a business or preparing the next generation to help them make informed, confident financial decisions. You will have a dedicated team, supported by a range of in-house specialists, offering expertise across portfolio management and wealth planning so you know your wealth is in safe hands. All while offering you the reassurance of working with a firm that is supported by the long-term stability and perspective of our ownership by the Princely Family of Liechtenstein.

With a team of investment managers based in offices across the UK, on hand to support clients locally, we combine professionalism with a human approach to build trusted relationships that last.

Why LGT?

Personalisation

Your bespoke portfolio is built around you. Your dedicated investment manager will create a plan shaped by your specific needs and long-term aspirations, delivering proactive, high-quality advice and coordinated support.

Stability

Your wealth in safe hands, thanks to the enduring financial strength of our ownership by the Princely Family of Liechtenstein, providing distinctive stability and continuity, and the assurance that we can continue to invest in our business over time.

Long-term partnerships

Your steady partner through change, your investment manager works with you as your situation evolves. Our personal relationships are built for the long term, focused on protecting and growing your wealth, while shaping succession strategies.

> “We recognise that no two individuals or families are the same, so we take the time to understand your unique circumstances and what matters to you.
>
> Heinrich Henckel, CEO

What you can expect

We listen first: Your investment manager begins by understanding what matters most to you: your ambitions, risk appetite and any family or geographic considerations, building a holistic view that informs every aspect of our advice.

We design your plan: That insight is translated into a tailored wealth strategy, where we take responsibility for constructing and managing your portfolio, complemented by access to integrated wealth planning and specialist expertise as required.

We stay close: We act as your sounding board and single point of coordination, adjusting your plan as circumstances change and conducting regular reviews so you stay informed.

We support you through change: We know that wealth is shaped by life's changing circumstances and we will provide support and perspective wherever we can, to guide your wealth strategy.

How we work with you

LGT can provide you with a variety of specialist services, depending on your unique requirements:

Portfolio management

Powered by the expertise and disciplined approach of our community of trusted investment managers, we offer active portfolio management built around your unique needs, with access to flexible, specialist solutions.

Wealth planning

Wealth planning
From pensions to inheritance tax planning, we help you navigate all complex planning needs.

Family governance
Family dynamics evolve across generations, often becoming more complex as wealth grows. We help you establish the structures, clarity and continuity needed to preserve your family's legacy.

Specialist services

Private markets
Through our longstanding relationships and scale, you can access carefully selected opportunities, typically reserved for institutional investors.

Offshore
Through our Jersey offering, you can access sophisticated solutions for your operation – delivered with flexibility and discretion.

US connected clients
If you have connections to the US, our specialist affiliate, LGT Wealth Management US, will help you navigate the associated complexity and manage your wealth seamlessly across jurisdictions.

Private office services
If you're seeking the benefits of a family office without the operational burden, we provide private office services and can work alongside your existing advisers.

Sustainable investing
If sustainable impact matters to you, we can align your portfolio to achieve your financial objectives while supporting positive environmental and social outcomes.

International services
If you are a UK resident non-domiciled or living internationally, your service will be tailored to your circumstances and jurisdictional requirements.

Charities
Your charity's financial strategy should reflect its objectives and values. We work closely with trustees to build a portfolio that supports your organisation's long-term mission.

Institutional
We provide bespoke investment management services to a range of companies. You will benefit from the clarity of an independent observer, with the understanding of an intimate insider.

Next steps

One of our advisers would be pleased to discuss your needs in more detail.

Call +44 (0)20 3207 8000
Email info-uk@lgt.com
Visit **lgtwm.com/contact**

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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