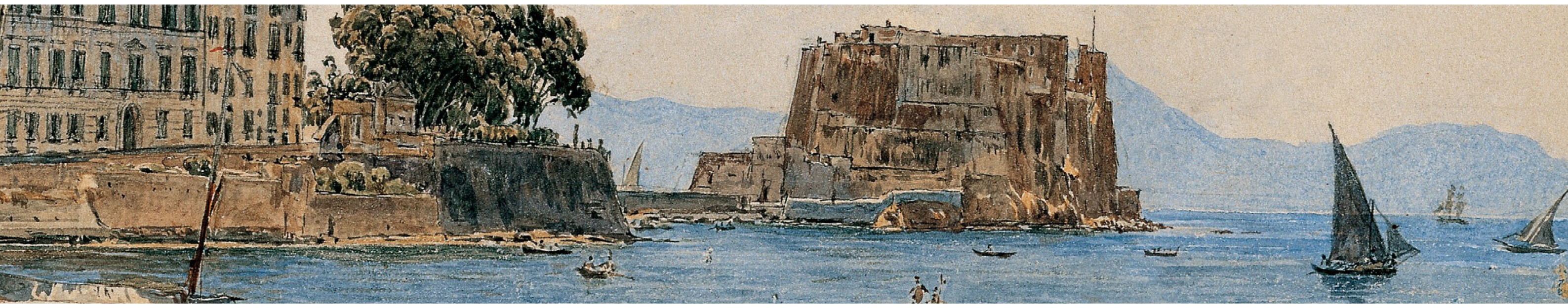
For Financial Advisers only



An introduction to LGT Wealth Management for international Independent Financial Advisers

About LGT Wealth Management

LGT is a UK-based wealth management firm, founded in 2008 to provide a transparent offering to clients and advisers. As at 31st December 2021, LGT manages over £21.4 billion in assets. Its private ownership structure allows it to take a genuinely long-term approach to investments.

LGT Wealth Management is part of LGT Group, owned by the Princely Family of Liechtenstein. LGT Group is the largest private banking and asset management group in the world that is wholly owned by a single family. As at 30th June 2021, LGT Group managed over £224.2 billion in assets and the Group benefits from a well-diversified revenue base and economies of scale. 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; Aa2 Moody's.

Why LGT?

We believe great results come from working in close partnership with you, the adviser. We provide you with a tailored service and the resources you need to help grow your business, and achieve the best outcome for your clients.

- We have Business Development Directors covering international markets who work purely with IFA partners. We aim to provide you with a personalised and individual level of service that best suits you and your clients.
- We understand that your clients are in fact your clients, so we provide you with the necessary support to assist the relationships you have with your clients.
- We are always transparent with our fees and the associated investment management costs, so you are privy to the costs and your clients know what they are paying for and why.
- Our breadth of proposition and technical support allows you to develop new business opportunities with professional introducers and clients alike, this adds depth to your own advisory proposition.
- We are privately owned which ensures a long-term outlook and financial security. We continually look for new ways to improve our service and proposition, and always value your feedback.

Our proposition and services

Bespoke discretionary management

Individually tailored portfolios designed specifically to meet the individual objectives of your client. We work closely with you as your client's adviser to understand the suitability requirements of your client, in terms of attitude to risk and capacity for loss. We make sure the portfolio is correctly positioned to provide the investment returns your client needs in order to meet their financial goals and objectives.

Sustainable portfolio service

Our sustainable portfolio service is designed for clients who are considering the impact their investment portfolios has on the world around us, and want to prioritise investment in companies whose activities make positive contributions to society and the environment. As each portfolio is tailored to the individual requirements of your client, our sustainable portfolio service is suitable for clients of all risk profiles and time horizons.

Global model portfolio services

Model Portfolio Service (MPS)

We offer a suite of global multi-asset portfolios denominated in sterling, euro and US dollars, which have been very successful in providing our strategic IFA partners with a cost effective outsourced investment solution for their expat clients. The model portfolios are managed from and custodied in Jersey, but can also be custodied on a select range of external platforms.

Sustainable Model Portfolio Service (SMPS)

We offer a suite of sustainable global multi-asset portfolios. The ultimate aim of the Sustainable MPS is to generate strong and consistent investment returns for clients, whilst supporting our sustainable philosophy. The portfolios will aim to achieve this by investing in a diversified range of funds, which incorporate themes such as renewable energy, financial inclusion, education, social housing, climate change action, sustainable waste management and renewable material production.

Additional services

LGT Wealth Management US

Planning for individuals who are US persons can be incredibly complex. By accessing the services of LGT Wealth Management US, we can provide for your US connected clients a range of model and bespoke portfolio solutions that are managed in strict accordance with US tax legislation and reporting requirements.

Lombard lending

We can provide an introduction to some of the country's specialist lenders to arrange financing for your clients on the most competitive terms. There is LGT Wealth Management Platform Lending or External Asset Manager Lending (EAM) available.

Technical consultancy

As part of our service to IFAs we provide technical support and CPD based seminars and workshops on a range of subjects including pensions, trusts and corporate and tax planning. We also work closely with financial advisers to help provide relevant CPD for their professional introducers. We can also assist with individual client scenarios and provide help and advice in giving your client the right financial planning outcome.

What value can a Business Development Director add to your business?

- Effective liaison between you and your clients and our Investment Managers and Model Portfolio Service team.
- Understanding your client's requirements and help implementing the most appropriate investment solution.
- High level administrative and compliance support.
- Effective communication on investment markets, financial planning and tax updates.
- Working with third parties such as external platforms and product providers.
- Support with your marketing initiatives and help building relationships with professional introducers.

Contact your local Business Development Director for more information about our services

Andy Newman, Partner
Head of International Business Development
Phone +44 (0)750 800 5585
andy.newman@lgt.com

Robert Hardy
International Technical Director
Phone +44 (0)782 646 3670
robert.hardy@lgt.com

Head of the Middle East*

United Arab Emirates

Netherlands

Michael Moss, Partner
Business Development Director
Phone +44 (0)794 666 6973
michael.moss@lgt.com

Asia*

Thailand

Malaysia and Singapore

Japan

Stuart Andrews
Business Development Manager
Phone +44 (0)791 858 0607
stuart.andrews@lgt.com

Europe

Portugal

Spain and Gibraltar

Cyprus

France

Switzerland

Ireland

Milly Baker
Business Development Manager
Phone +44 (0)791 857 8719
milly.baker@lgt.com

Alice Gerry
Business Development Director
Phone +44 (0)774 116 2188
alice.gerry@lgt.com

Brendan Macken
Business Development Director
Phone +44 (0)776 705 3421
brendan.macken@lgt.com

*Not pictured but also covering Hong Kong

LGT Wealth Management UK LLP
14 Cornhill
London
EC3V 3NR
www.lgtwm.com

LGT Wealth Management US Limited
14 Cornhill
London
EC3V 3NR
www.lgtwm-us.com

LGT Wealth Management Jersey Limited
Charles Bisson House, 30-32 New Street
St Helier, Jersey
JE2 3TE
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.