Wealth Management

LGT Wealth Management investment services
for international Financial Advisers

Model Portfolio Services

Global MPS

Three risk profiles available in GBP, EUR and USD

AMC = 0.25%
Custody = 0.25%
or 3rd party platform

7IM, Novia Global, Praemium International and Ardan International

Global Sustainable MPS

Three risk profiles available in GBP, EUR and USD investing in companies with strong ESG credentials

AMC = 0.25%
Custody = 0.25%
or 3rd party platform

7IM, Novia Global, Praemium International and Ardan International

- Actively managed multi-asset portfolios with a blend of strategic and tactical asset allocation, rebalanced on a monthly basis
- Available for financial advisers and their clients only
- Ongoing adviser support via CPD events and direct access to our technical director
- Regular investment commentary and access to our app

Tailored service

Bespoke Portfolio Service

Portfolios built around the unique requirements of each individual, with the option to incorporate investments that have a positive impact on the world

AMC = 0.50%
Custody = 0.25%

- Tailored wealth management service built around the client's financial objectives, attitude to risk, income requirements, tax considerations and ethical or sustainable views
- Portfolio construction can hold direct equities and collectives
- Dedicated investment managers

Additional services

LGT Vestra US

A range of model and bespoke investment solutions for US connected individuals

AMC = 0.90% or 0.50%
with 3rd party platform
Custody = 0.25%
or 3rd party platform

Praemium International

- Five model portfolios available in USD and GBP
- Global ISA and Ethical portfolios available in GBP
- Bespoke portfolios available
- Direct holdings suitable for US clients
- UK and US tax reporting

Lombard lending

Via LGT, lending facilities are available

Cost of borrowing = margin (1.5%) + cost of funds

- Lending facility offered on a rolling or fixed term basis depending on client's needs
- Minimum drawdown is GBP 1 million (requires assets of approximately GBP 2 million and above)
- No arrangement or rolling fees

Wealth
Management