Wealth Management US

Wealth planning

Personalised to your unique circumstances

Wealth planning for US connected clients

Our dedicated wealth planning team provides comprehensive financial planning advice to individuals, companies, partnerships and trusts with a US connection. We offer unbiased advice to best service your needs.

About wealth planning

Our comprehensive financial planning approach helps ensure your ambitions remain on track. In partnership with you, we work to create a bespoke financial plan, designed around your individual needs and offering long-term guidance. We consider the whole of the market 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:

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

Our services

Whatever your goal is for the future, we will work with you to achieve it. We take the time to talk with you about your family, your circumstances and your legacy. Our objective is to create a long-term plan to achieve your goals and objectives.

From pension accumulation and retirement planning to inheritance tax planning and providing for school fees, we offer a comprehensive range of financial planning services.

Wealth Planning considerations:

- Cash flow analysis
- Psychometric risk profiling
- Retirement planning
- Social Security and State Pension optimisation
- Pension aggregation
- Income 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
- Venture Capital Trusts, Enterprise Investment Schemes and Business Property Relief advice

What makes us different?

- Experienced professionals providing unbiased and impartial advice
- Access to the whole wealth planning market
- Asset allocation based on your specific appetite for risk and return expectations
- Maximising the efficiency of your tax position
- Offering a high level of service and support for you
- Clear and transparent reporting
- Competitive and transparent fees

Our team

Swaati Osborne, Chartered MSCI, FPFS, TEP
Head of Wealth Planning
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Swaati is responsible for heading up our wealth planning department at LGT Wealth Management US. She has worked in the financial services industry for over 15 years.

With experience advising high and ultra-high net worth individuals and families, Swaati provides specialist advice across all areas of wealth planning, including pension advice, wealth structuring, retirement income funding and intergenerational wealth planning.

Swaati and the wealth planning team specialise in assisting our US connected clients with the additional cross-border planning complexities they face.

Titles and accreditations

- Chartered Financial Planner (UK)
- Chartered Member of CISI
- Fellow of the Personal Finance Society
- Full Member of STEP (TEP)

Swaati graduated from the University of Southampton with a MSc in International Financial Markets and a BSc (Hons) in Economics and Finance.

Hannah Pulleyn, MSCI, CFP®
Wealth Planner
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Hannah joined LGT in 2024 to provide wealth planning support to high net worth US connected families. Having spent over ten years in the financial advice and wealth management industry, she previously worked at a firm which was also dual registered with the FCA and SEC and specialised in advising American citizens in the UK and around the rest of the world.

She has experience in both US and UK tax wrappers, along with cash flow modelling and navigating the complex issues surrounding retirement and estate planning for global Americans to ensure their wealth is well structured and tax efficient.

Titles and accreditations

- CERTIFIED FINANCIAL PLANNER™ (UK)
- Chartered Member of CISI
- CII Diploma in Regulated Financial Planning (UK)

Hannah graduated from the University of Surrey with a BA (Hons) in English Literature.

Lydia Blackman, DipPFS
Trainee Paraplanner
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Lydia joined LGT in 2024 to assist the team in providing wealth planning support to high-net-worth US connected families. She has worked in the financial services industry for over three years and previously worked as a wealth administrator. Lydia has completed the CII Diploma in Regulated Financial Planning [UK] and is currently studying towards the Advanced Diploma.

Lydia graduated from Goldsmiths, University of London with a BA in Politics, Philosophy and Economics.

Important information

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