



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 help you make your dreams a reality.

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

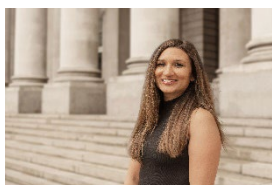
Our services include:

- Cash flow analysis
- Psychometric risk profiling
- Retirement planning
- Social Security and State Pension optimization
- 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 investment 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

Head of Wealth Planning
D: +44 20 3207 8386
E: swaati.osborne@lgt.com

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
- Affiliate member of STEP

Swaati graduated from Southampton University with a MSc degree in International Financial Markets and a BSc in Economics and Finance.



Daniel Zeitoun, CFP®

Trainee Wealth Planner
D: +44 20 3943 8518
E: daniel.zeitoun@lgt.com

Daniel joined LGT in 2022 to support the wealth planning proposition for US connected private clients. Previously, he spent over three years in the United States as a financial advisor for UBS Wealth Management.

He has unique experience advising US individuals, specialising in the development of retirement plans, investment structures and tax-efficient planning. Leveraging the full capabilities of LGT and his professional network, Daniel helps clients overcome the jurisdictional constraints of managing their wealth across the Atlantic.

Titles and accreditations

- CERTIFIED FINANCIAL PLANNER™ (US)
- CERTIFIED FINANCIAL PLANNER™ (UK)
- CII Diploma in Regulated Financial Planning (UK)
- FINRA Series 7, Series 66, and Securities Industry Essentials license (US)

Daniel graduated from Christopher Newport University in Virginia, USA with a Bachelor's degree in Finance.

Important information

LGT Wealth Management US Limited is a registered Company in England & Wales, registered number 06455240. Registered Office: 14 Cornhill, London EC3V 3NR. LGT Wealth Management US Limited is Authorised and Regulated by the Financial Conduct Authority in the United Kingdom and is a Registered Investment Adviser with the Securities & Exchange Commission in the United States.

This publication is marketing material. It is for informational purposes only and is intended for confidential use by the recipient. It is not to be reproduced copied or made available to others. This document is considered to contain information about LGT Wealth Management US Limited and general market commentary. This document does not constitute advice or a personal recommendation, or take into account the particular investment objectives, financial situations or needs of individual clients. This document is not intended and should not be construed as an offer, solicitation or recommendation to buy or sell any investments. You are recommended to seek advice concerning the suitability of any investment from your investment adviser.

Past performance is not a reliable indicator of future performance; and the value of investments, as well as the income from them can go down as well as up, and investors may get back less than the original amount invested.

The information and opinions expressed herein are the views of LGT Wealth Management US Limited and are based on current public information we believe to be reliable; but we do not represent that they are accurate or complete, and they should not be relied upon as such. Any information herein is given in good faith, but is subject to change without notice. No liability is accepted whatsoever by LGT Wealth Management US Limited or its employees and associated companies for any direct or consequential loss arising from this document.