Wealth
Management US

Portrait

The bigger picture in wealth management

Forward-looking
for generations

Cover image
Carl Rottmann, detail from "Mountain Landscape with Lakes and Storks", 1822.

Contents

Inside the Princely Collections

For more than 400 years, the Princes of Liechtenstein have been passionate art collectors. The Princely Collection is the result. Comprising more than 1,600 paintings, the collection is made up of masterpieces ranging from the early Renaissance to the second half of the nineteenth century. It is one of the world's major private art collections. While the idea of promoting fine arts for the general good enjoyed its greatest popularity during the Baroque period, the House of Liechtenstein continues to pursue this goal to this day.

At LGT, we take inspiration from the art in the Princely Collections. For us, the collection embodies the values that form the basis of all successful partnerships: expertise, reliability and a long-term focus. Just like the experts who care for the masterpieces, our team of professionals diligently curate the wealth of our clients. By drawing upon this rich heritage, LGT has honed wealth management to an art.

Craft

The art of wealth management

With a family legacy spanning 900 years through our owners, LGT has honed wealth management into an art. Just as artists create masterpieces with precision and skill, we apply our deep understanding of financial markets, investment strategies and economic trends to achieve our clients' objectives.

The bigger picture in wealth management

Dear Reader,

Welcome to LGT Wealth Management US. Thank you for taking the time to learn more about our Investment Management and Wealth Planning services.

Living, working or investing across borders can make managing your wealth feel complex. We take the time to understand your unique circumstances and what matters to you, so that you can focus on the people and priorities that are most important. Our clients are at the heart of what we do: trust, integrity and a personalised approach underpin every relationship we build.

For many of our clients, investing is about more than financial returns alone. It is about providing for family members across borders, planning for education and retirement in more than one country and managing the transition of wealth between generations. We understand these responsibilities and work closely with you and other advisers you may have to build solutions tailored to your individual objectives. Our ambition is for clients to feel supported at a global level, so our highly specialised service takes into account the tax and investment constraints US persons face, wherever they reside.

Being part of a family owned global enterprise is central to how we approach this work. Our owners, the Princely Family of Liechtenstein, bring both a heritage of entrepreneurship and a genuinely long term perspective, empowering us to make decisions guided by a forward-looking vision, with a focus on preserving and growing wealth over generations.

Global events continue to shape markets, bringing both change and opportunity. Geopolitical, economic and technological shifts can create periods of volatility, but they also drive innovation and a renewed focus on certain investment themes. While we cannot predict the future, we can help you stay focused on the long term. Our aim is to support our clients in reaching their objectives by constructing resilient, well-diversified portfolios that are positioned for growth over time.

Further developments in artificial intelligence and digitalisation continue to shape our industry, transforming businesses and offering exciting opportunities. We embrace innovation where it genuinely enhances the service we provide – supporting our people, improving our platform and driving efficiencies. As a people business, technology provides us with the opportunity to deepen and enhance our expertise, but never to replace the human judgement or relationships at the heart of our organisation.

At LGT, our aim is to combine US specialist expertise with the resources and stability of a global, family-owned group to help you achieve your financial goals. We would be delighted to explore how we can support you and your family, today and in the years ahead.

Let us show you the bigger picture in wealth management.

Paul Nixon
CEO LGT Wealth Management US

Portrait of a wealth manager

Since our launch in 2013, LGT Wealth Management US has been striving to deliver a masterclass in managing client money. Here's what you need to know about us.

At LGT, we believe wealth has many facets, as does its management. There is the process: the analysis of risk and opportunity and the examination of financial instruments. There is the science: the knowledge and experience that distils meaning from the limitless flow of data. And there is the art: of constructing portfolios, managing investments and growing wealth. This is the essence of our wealth management approach, but it is only half the story. We realise that wealth has social and human dimensions and that financial decisions are driven by hopes, fears and dreams as much as by facts and analysis. Understanding the bigger picture is what we do.

Creative dynasty: an independent, family-owned ethos

As we continuously look to enhance our client experience, we leverage the support of our forward-thinking owners, the Princely Family of Liechtenstein. The ethos of entrepreneurship that drives our flexible and dynamic approach is underpinned by the family's financial strength and enduring stability.

Following a successful first half year of growth in 2026, LGT has over CHF 412.6 billion of assets under management, along with a Tier 1 capital ratio of 18%.[1]

Our perspectives on wealth management have always been aligned. LGT was founded on integrity and the belief that championing our clients' interests, over and above a relentless drive for profit at all costs, was the right thing to do. We are not afraid to make decisions that positively set us apart from the crowd. The alignment of interests between our clients, owners and employees serves as a cornerstone of our operations.

Crafting a masterpiece: commitment to client satisfaction

Our ambition is to always surpass client expectations. To achieve this, we adopt a highly personalised approach that focuses on cultivating enduring relationships with each individual client. Our dedicated investment managers always take the time to understand your unique circumstances.

Trust, integrity and transparency form the bedrock of our client relationships, and we deeply value the partnership we share with clients. Our organisational culture embraces diverse perspectives and empowers our team to approach challenges with unwavering conviction, striving for market-leading results on your behalf.

Our track record speaks volumes, boasting an impressive 97.8% client retention rate for 2025, a testament to the enduring trust our clients place in us. We remain dedicated to delivering excellent service, collaborating with our clients to support their individual needs and work towards achieving their unique goals.

[1] As of 30 June 2026

Artistic analysis: a creative and rigorous investment process

Our investment process is marked by rigour and discipline, led by our Investment Committee (IC), a group of senior professionals with deep market knowledge and insight. The IC adopts a high-conviction approach, guided by a focus on consistent and sustainable returns over the long term. We encourage the IC to question the status quo and challenge each other's opinions, to promote a plurality of thinking. We blend a spectrum of assets to achieve the right balance aligned with our clients' risk tolerance. Our global approach provides the flexibility to invest across diverse asset classes, sectors and geographies, ensuring a comprehensive and well-rounded investment approach. Being independent and unbiased allows us to align our trajectory with our clients' requirements.

Sustainable visions: dedication to a sustainable future

Sustainability is at the heart of our corporate philosophy. The Princely Family of Liechtenstein recognised early on how important sustainability is for our environment, society and future. We actively work towards helping to build a more sustainable future in all our endeavours. We proudly uphold our commitment to the UN Global Compact, Principles for Responsible Investment (PRI) and Banking (PRB), while also playing a founding role in the Net Zero Banking Alliance (NZBA).

To further bolster our sustainability efforts, we have developed our own proprietary tool for environmental, social and governance (ESG) analysis which enables us to consider the broader impact and intentionality of investments on the environment and society.

> **"Above all, we recognise that it is a privilege to look after our clients' wealth and believe we must continuously earn this right.**
>
> Paul Nixon, CEO LGT Wealth Management US

LGT's UK headquarters can be found in London at 14 Cornhill with offices also in Edinburgh, Jersey, Bristol, Leeds, Birmingham and Manchester.

Curate

Expert curation of investments

We aim to act as an expert curator of wealth and client portfolios, going beyond mere numbers to embrace a more conceptual approach to wealth management: it's about realising dreams, aspirations, values and driving a brighter tomorrow. Discover how our approach sets us apart.

A palette of possibilities

Explore LGT's personalised services for clients with a US connection, with an approach focused on building lasting partnerships and developing trust through transparency.

As a specialist affiliate of wealth management firm LGT Wealth Management, our firm was set up specifically to help clients with personal and financial connections to the US. We believe that a global perspective is the best way to achieve our clients' goals, an approach we adopt wherever our clients are based. We take pride in offering bespoke solutions and services, each meticulously crafted to cater to your individual financial aspirations.

Just as art tells a story, let us weave a narrative of financial success together.

Wealth management for US connected clients

While the world shrinks, our ambitions expand

We help US nexus investors overcome the diverse challenges faced when it comes to navigating multiple tax regimes. Any investment decisions we make take into account the tax implications and constraints that are unique to your personal situation.

Our international expertise means that we can help you construct and implement an investment strategy compliant with any US tax rules. To assist with tax reporting obligations, we provide you with an annual tax pack designed specifically for your personal circumstances.

We believe in working closely with your other professional advisers, tax or legal, to ensure that we are all aligned and working in your best interests. Your dedicated wealth management team will embark on a collaborative journey with all parties, working closely with you to devise tailor-made investment strategies.

Portfolio management

Set the level of your investment and the level of your involvement

We recognise that everyone has their own preference for how they want their money to be managed. Whether you want daily, hands-on control over your capital or would prefer the guidance of our diligent professionals, your team will get to know you and build a portfolio based on your goals and aspirations. Choose from:

Discretionary portfolio

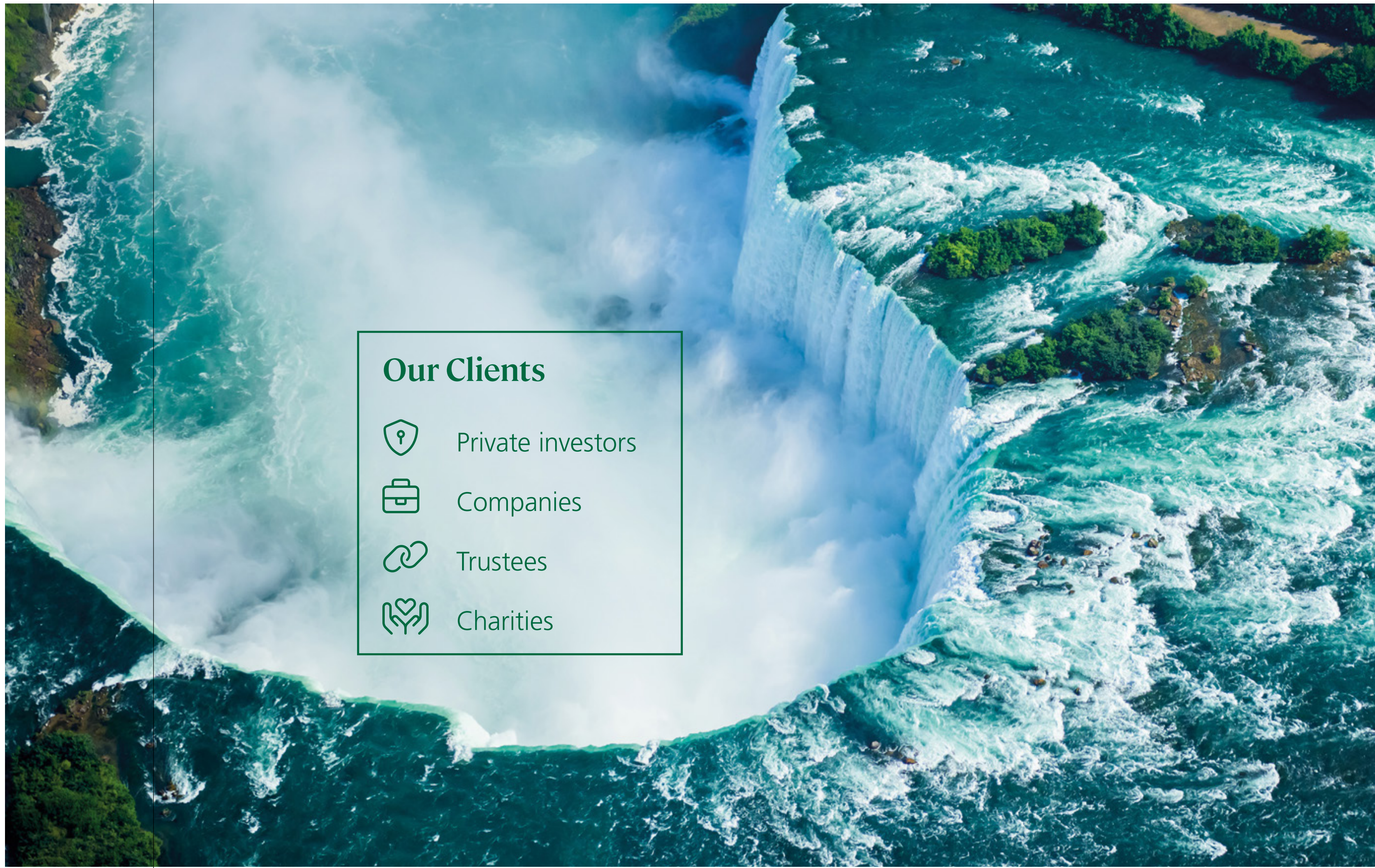
For clients who wish to delegate investment decisions

Your personal wealth management team will handle the day-to-day management of your discretionary portfolios, guided by LGT's investment process, your objectives and risk tolerance.

Advisory portfolio

For clients who prefer to be more involved with both the investment strategy and the daily decisions

Your wealth management team will tailor your portfolio according to your objectives and sensitivity to risk. No transaction will be executed without your prior agreement.



Wealth planning

Aspirations become reality through artful curation

Our comprehensive wealth planning service caters to individuals, companies, partners and trustees. With bespoke financial plans tailored to your needs, we ensure your long-term ambitions remain on track. From pension accumulation to inheritance tax planning, our unbiased advice encompasses a wide range of services, guiding you towards a secure financial future. We regularly review and adapt your plan to keep you on track to achieve your objectives. Rest assured, our focus remains solely on your success, with no in-house products to influence our impartial recommendations.

Sustainable investing

Together, small changes can have a large impact

Investing your wealth should be aligned with your principles. We can identify investment options based on long-term profitability, how they contribute to society and the planet and alignment to the United Nations Sustainable Development Goals.

Private markets

The road less travelled can be the road most rewarding

We help you explore investment opportunities in a wider range of alternative asset classes, including single company and fund-based private equity structures. As entrepreneurs and private market participants ourselves, we have a highly developed understanding of the broad ranging issues facing investors in fast-growing unquoted companies and other less liquid assets. Our offering includes tax-efficient investments and a variety of strategies for diversification opportunities.

Investment services for US expats

Our suite of Global Investment Accounts (GIAs) can support a range of instruments, ensuring US and international tax-efficient growth, along with expertly managed UK and international pensions. In addition, our account solutions ensure compliance with intricate cross-border regulations.

Tailored investment solutions for US citizens

From US pensions and trust accounts to qualifying insurance products and Global Investment Accounts, our comprehensive range of investment services is meticulously crafted to support your financial growth and security as a US citizen.

Flexible custody arrangements

We specialise in providing flexible custody solutions that span various jurisdictions, ensuring your assets are securely held in locations such as the UK, US and offshore. This strategic approach to custody offers you both convenience and peace of mind, as your holdings are safeguarded according to your specific preferences and regulatory considerations.

US and UK tax reporting

Tax reporting for our clients is comprehensive and tailored to meet the needs of those filing tax returns in either the US, the UK or both. We provide the necessary tax documents for your accountant to file returns in either Jurisdiction. In addition, we support those firms and individuals that have an obligation to monitor employee investments, and collaborate with tax advisors to ensure accurate reporting and maximise client tax efficiency.

> “
> **Our focus is on ensuring we meet and exceed our clients’ expectations, wherever home is.**
>
> Paul Nixon, CEO LGT Wealth Management US

Our LGT Wealth platform offers clients the opportunity to view their portfolio information whenever is convenient for them, without compromising on security.

The canvas of success

Sometimes numbers speak louder than words. Here we present a glimpse into the story of LGT, through the lens of numbers. Each stroke on the canvas portrays our key milestones and achievements.

LGT Wealth Management - Key Figures (as of 30 June 2026)

GBP 35bn	7	600+
Assets under management	UK office locations	Headcount

LGT Group - Key Figures (as of 30 June 2026)

CHF 412.6bn	40+	6000+
Assets under management	Global office locations	Headcount

Awards

LGT has received numerous awards and wide-spread recognition across the industry for our fresh approach to wealth management and our forward-looking approach to doing business.

Investment International Awards
Excellence in Sustainability
Winner 2025

The City of London Wealth Management Awards (COLWMA)
Wealth Management Excellence
Winner 2025

Wealth for Good Awards
NextGen Support, Global Reach
Winner 2025

Wealth for Good Awards
Innovation in Sustainability, Global Reach
Winner 2025

Women in Investment Awards
Investment Group of the Year for D&I
Winner 2025

The future of private banking: The human factor in the age of AI

Artificial intelligence is transforming industries at extraordinary speed, and private banking is no exception. For H.S.H. Prince Max von und zu Liechtenstein, Chairman LGT, this shift opens up powerful opportunities – and raises fundamental questions about the essence of banking and the value clients expect from their partners.

Highness, you have been monitoring the rise of AI closely. What is your personal reaction to these developments – optimism, scepticism or alarm?

H.S.H. Prince Max I remain fundamentally optimistic – but with my eyes open. History teaches us that technological revolutions often unfold in waves, accompanied by periods of overinvestment, high expectations and, eventually, corrections. Artificial intelligence is no different. Transformative technologies typically have broad consequences – many are very positive, but some are more difficult and dangerous. That calls for optimism, but also for realism and prudence.

How does this translate into LGT's thinking as a private bank?

At LGT, we are taking a proactive and purposeful approach. For several years now, we have been exploring where AI can genuinely support our clients and our people – from portfolio construction and research to improving our broader process landscape and client interaction. AI agents will increasingly support our relationship managers in tailoring our advice even more individually. For large and complex organisations, the effective use of AI will become a key success factor, but we are still in the early stages of this journey and our thinking will progress as AI-driven applications evolve.

AI appears to be reshaping what clients expect from their bank. Are you seeing that shift?

I do. I see a profound change rooted in the democratisation of information. High-quality insights – portfolio analyses, risk diagnostics, macro research – are becoming accessible to everyone at the click of a button …

… whereas for decades, exclusive access to sophisticated information was a defining advantage of private banks.

It was, but that era is ending. If the difference between an AI-generated portfolio analysis and a conversation with your relationship manager becomes too small, clients will rightly ask: what is the added value?

And what is your answer?

LGT will, of course, continue to strive to obtain investment information that is difficult to access. The situation varies depending on the asset class and strategy. Listed securities, for example, are much more affected by this development than private equity, which continues to be characterised by exclusive information and relationships. However, I see our key added value in our judgement, our experience and our trustworthy advice. I am convinced that our clients will continue to seek personal contact with their relationship managers to discuss issues and make important decisions.

> **Human and personal relationships will remain at the core of our activities.**
>
> H.S.H. Prince Max von und zu Liechtenstein

In other words, the differentiator for private banking in an AI-driven world is human relationships?

Human and personal relationships will remain at the core of our activities. AI will be very helpful in many areas, but it does not understand personal emotions and ambitions, values or family dynamics. It does not coach people through uncertainty or conflict. There are situations where our clients will appreciate having a true partner and trusted adviser by their side. In a world that is becoming more complex, polarised and short-term oriented, this kind of long-term, trust-based guidance becomes even more relevant.

That sounds especially relevant for families.

It is. Many of the most meaningful conversations happen during moments of transition: preparing children for responsibility, the sale of a business or the receipt of an inheritance. These are defining chapters in a family's life, and they require continuity, empathy and real partnership.

Speaking of generational change: LGT has a strong reputation for its work with the next generation. Why is this such an important strategic priority for you?

Every generational transition carries both financial and emotional complexity. Wealth is more than capital: it reflects identity, responsibility and future potential. As a family-owned bank, we understand these dynamics first-hand. We accompany families holistically – looking not just at investments, but at governance, structuring, communication and purpose.

H.S.H. Prince Max speaking at the LGT Climate Conference 2025.

LGT's corporate claim is "Forward-looking for generations". What does foresight mean to you personally?

We are operating in a world that is being reshaped by powerful forces – rapid technological progress, the global transition towards decarbonisation and higher resource efficiency, demographic change, rising geopolitical fragmentation and increasing fiscal imbalances in many major economies. To me, foresight means the ability to deeply understand these trends and their broad-based implications, and to engage and invest in this environment in a way that generates good financial returns while also having a positive impact on our societies and the environment.

Last year marked your twentieth anniversary at LGT. How has the organisation changed during that time?

It has been a remarkable evolution. When I joined LGT two decades ago, it was still a relatively small private bank mainly active in offshore private banking that was strongly characterised by banking secrecy. Today, we are more than five times larger, with a broader international presence, strengthened competencies and a significantly more diversified business model. Of course, with scale comes complexity. Challenges have not disappeared; they have simply changed shape. But our strengths – family ownership, long-term thinking, a strong culture and more than 6000 highly committed colleagues across the globe – give us a robust foundation to navigate uncertainty.

One final question: What would you like prospective clients to know about LGT?

Our purpose is to help our clients protect, grow and shape their wealth in a way that reflects not only their aspirations for financial return, but also their values, identity and the future they want to build. We see ourselves as a partner – not merely an investment provider. And to me, that is the real significance of this technological moment. The age of AI does not diminish what matters – it makes it more visible, and more valuable. ◆

The Princely House of Liechtenstein

The line of descent of the Princely Family of Liechtenstein began with Heinrich I of Liechtenstein (1216–1265), who was given freehold ownership of the baronial estate of Nikolsburg in South Moravia from King Ottokar of Bohemia. In 1699, Prince Johann Adam I acquired the Lordship of Schellenberg, followed by the county of Vaduz in 1712. In 1719, the territories were united and elevated to the status of Imperial Principality of Liechtenstein. Today, the Principality of Liechtenstein is a constitutional monarchy and sovereign state in the heart of Europe. As the head of the Princely Family and also the head of state, the reigning prince exercises sovereign authority together with the people of Liechtenstein. The Princely Family is active politically and has numerous business activities. It is a keen advocate of the arts, sciences and social welfare. **fuerstenhaus.li/en**

Artistry of adaptation

Paul Nixon, CEO of LGT Wealth Management US, on supporting US-connected families globally, navigating cross-border complexity and maintaining a long-term perspective.

Wealth is increasingly global, and so are families. How does LGT help US-connected clients navigate the complexity of managing wealth across borders?

Paul Nixon: Since we launched in 2013, our business has evolved alongside our clients – from supporting US-connected individuals in the UK and Europe to increasingly working with US-based families who want part of their wealth invested internationally.

Our role is to support US-connected clients wherever they reside. We work closely with our Global Investment Solutions team, combining global perspectives with our specialist US knowledge to design solutions around each client's specific objectives. Wherever their assets sit, we make sure tax reporting feels as simple as if everything were held in the US, enabling clients to benefit from an international investment platform while keeping their US paperwork clear and manageable.

What are the key trends you're seeing among US-connected investors today?

Over the past few years, we've seen a clear shift in how many US clients think about where their money is invested. After more than 20 years of US markets leading global equity returns, more US-resident clients are now asking whether they should diversify – not just by sector or company, but across currencies and regions. For US-based clients who want to take a more international approach, we draw on our global expertise to build well diversified portfolios that remain appropriate for their position as US persons.

Artificial intelligence (AI) remains a central theme across the investment landscape, public debate and boardroom discussion. How is LGT approaching AI?

AI continues to transform our industry, from investment opportunities to how businesses operate. As early adopters, our focus has always been on thoughtful, well-governed implementation, with our clients' interests firmly at the centre. We see AI as a tool to augment, rather than replace, human expertise: by streamlining processes, supporting productivity and enhancing research and risk management, AI helps our teams to focus on what matters most – delivering high quality advice and excellent service for our clients.

From an investment perspective, attention has begun to shift from a small group of large US technology companies to a much broader structural trend that is shaping risk and opportunities across sectors. Our job is to look beyond the headlines and identify where AI is likely to create sustained value for clients over the long term.

The world continues to feel uncertain, geopolitically and economically. Against this backdrop, how does LGT ensure clients stay on track towards their long-term goals?

We focus on helping clients control the controllables – starting with a clear understanding of their goals, time frames and tolerance for risk. Market volatility is nothing new, so we apply a disciplined, well-diversified investment approach to build resilient portfolios that are intended to generate returns over time. Maintaining perspective is crucial: we look beyond short-term market moves and carefully assess which developments really matter, rather than reacting to every headline. Change may be the only constant, but with a clear investment philosophy and a steady approach, we aim to provide stability and clarity for our clients, helping them adjust to whatever the market brings.

> "We aspire to be a trusted partner for our clients and to remain consistently aligned with their long term interests.
>
> Paul Nixon, CEO LGT Wealth Management US

Having supported US connected clients since 2013, what do you see as distinctive about LGT's approach?

Since our launch, we've grown the business by responding to real client situations, listening carefully to what US-connected investors need and building practical solutions around that. While experience and expertise matter, it is our people that truly define us. Our team brings together colleagues from a wide range of backgrounds, all with a common grounding in US regulation and the needs of our clients. This mix of diverse perspectives and shared focus supports nuanced, cross border thinking.

Equally, being part of a family owned global business gives us the stability and perspective to think in years and decades, not quarters. Free from short term market pressures, we invest meaningfully in our people and client relationships, and remain focused on creating enduring value over time. Ultimately, we aspire to be a trusted partner for our clients and to remain consistently aligned with their long term interests.

Nurture

A vision for the future

Our destination is financial success for our clients and making a positive impact. We aim to do this through our commitment to long-lasting client relationships and a values-driven approach to wealth management. Together, we will cultivate and grow investments, support our people and the planet.

The colour of change: sustainability at LGT

Creating value for future generations is in LGT's DNA – thinking, acting and investing sustainably is an integral part of what we do.

Our owner, the Princely Family of Liechtenstein, has long recognised the importance of sustainability and is deeply committed to ensuring that the business is aligned with the interests of future generations. We apply the same forward-looking perspective to our investment philosophy and our operations, adopting a holistic approach to value creation across our business activities.

To this end, we implement a comprehensive sustainability strategy that combines environmental stewardship, social responsibility and robust corporate governance. This strategy forms a framework of responsible business practices that guides our operations and supports our commitment to delivering long-term, sustainable value for our four stakeholders – our clients, our people, our owner and wider society.

Being a responsible investor

We avoid investments that pose significant environmental, social and governance (ESG) risks:

- Our policy on the exclusion of controversial weapons ensures that we do not invest in companies involved in the manufacture or sale of controversial weapons. The term controversial weapons refers to military weapons that either cause combatants disproportionate suffering or that if used, result in a large number of innocent victims, especially civilian victims.

- We exclude companies that are involved in mining coal that is used in energy production. Companies involved in mining thermal coal will be excluded if the contribution to revenues generated through thermal coal activities exceeds 5% of their total revenues, or if they are responsible to more than 1% of global annual thermal coal production.

Sustainable investment solutions

Since the launch of our sustainable investment proposition in 2018, we have remained committed to delivering strong financial performance whilst also striving to drive meaningful change for wider society and the environment. We integrate the United Nations Sustainable Development Goals (SDGs) into our sustainable investment framework to measure the impact of our investments and incorporate ESG factors into the investment process to identify both risks and opportunities.

Our sustainable investment proposition empowers clients to optimise their portfolios, not only in terms of risk and reward, but by investing in the solutions to environmental and societal challenges across both private and public markets. Your investments are an opportunity for you to make a targeted contribution towards overcoming global challenges like climate change and social inequality, in alignment with the UN SDGs and your financial goals.

LGT Climate Ambition 2030

By 2030, we are aiming to reduce our emissions (Scope 1 and 2) by 90% compared with 2019.

2025 fundraising total: £368 215

Doing business sustainably

By adopting an integrated sustainability strategy that incorporates financial, operational, social and environmental considerations, we aim to build business resilience, maximise efficiency and minimise negative impacts from our operations. Our strategy sets ambitious targets in the areas of facility management, procurement, digitalisation, energy consumption and CO_2 emissions, with a goal to drastically lower our energy consumption, paper consumption and Scope 1 and 2 carbon emissions by 2030.

Through our UK Operational Sustainability Strategy 'Build Good and Spend Good', we drive operational enhancements and support initiatives that target our sustainability objectives. This includes embedding a sustainable approach to our physical office environment, including refitting and refurbishment, as well as ensuring we are managing electronic waste efficiently and enhancing due diligence with business suppliers.

As a firm, we also seek to have a positive social impact within the wider community. Giving back is a key part of our philosophy, and we support a range of social initiatives and charity partners that are helping to address important issues, such as education, social mobility and healthcare. Our internal Charities Committee provides strategic direction on our company philanthropic efforts, emphasising long-term partnerships and community engagement.

> “We are all part of one big ecosystem which we influence – at a personal, a business and a political level.
>
> H.S.H. Prince Max von und zu Liechtenstein, Chairman LGT

Driving change through stewardship

For us, the term stewardship is expressive of both our responsibilities to clients, as well as to the societies and environments in which they live. Through our global stewardship strategy, we look to ensure responsible capital management that aligns with our fiduciary duty to our clients, maximising investment returns whilst driving meaningful change through market participation. Through active voting, engagement and policy advocacy, we actively encourage companies to recognise and adequately manage environmental and social risks and adopt sustainable practices that align with long-term value creation for all stakeholders.

Part of our culture

At LGT, sustainability remains a strategic priority, rooted in the belief that sustainable business decisions are sound business practice. We pride ourselves on our ability to positively challenge the status quo and we remain dedicated to driving positive change in our industry. Our commitment is not just a brushstroke; it's an ever-evolving creation.

The art of caring: nurturing success

A place for people from all walks of life: our unique culture and values are what make our company stand out from other firms. We are focussed on long-term success and stability, rather than short-term profits.

Just as brushstrokes create art, our people define our culture

Belonging

At LGT, we celebrate the unique contributions of our diverse workforce, ensuring an inclusive culture where everyone feels valued and appreciated. We invest in our people, providing cutting-edge technology, industry-leading training, mentorship programmes and generous benefits. In addition, our focus on wellbeing, driven by our Enrich Committee, creates a strong sense of belonging and purpose for all.

Respect

We recognise that individuals work most effectively when they love where they work and feel respected for the value they are adding. For us, this feeds directly into creating a great client experience–a common goal we achieve through mutual respect for each other as individuals and as experts within our respective roles. We promote an environment that supports diversity and inclusion, maintains wellbeing and encourages sustainability. We believe that as a firm it is our responsibility to respect and consider our impact on the environment, society and each other.

Integrity

Upholding unwavering ethical standards, we are dedicated to building enduring client relationships based on trust and transparency. We take a nimble approach, empowering our teams to adapt and tailor solutions to meet each client's specific needs, ensuring ethical and thoughtful decision-making in every aspect of our business.

Conviction

Guided by our values, we stand firm on our principles, setting ourselves apart through ethical and responsible practices. Our conviction attracts exceptional talent, forming a cohesive team dedicated to delivering top results and making a meaningful difference for our clients and society.

Entrepreneurship

Our entrepreneurial spirit drives us to continuously innovate and explore new possibilities in wealth management. We foster a culture where ideas are encouraged, challenges are embraced and adaptability is prized, allowing our people to flourish and make a positive impact in the industry.

92% of our people say LGT is a "Great Place to Work"

Diversity, equity and inclusion

Our goal is to attract, develop and retain the best and brightest from a range of different backgrounds. We believe diversity and inclusion is something to be championed and celebrated, contributing value in many ways - from creativity and innovation to business performance and improved recruitment and retention.

We therefore promote and foster an inclusive, respectful culture where all individuals are treated fairly and have every opportunity to excel in their chosen careers. This strategy is driven by our Management Board and our diversity and inclusion committee, but crucially upheld by every one of our employees.

A good example of our dedication to fostering an inclusive work environment is reflected in our parenting policy. We believe that parenting should be viewed as equally important, regardless of gender. To support this belief, we have revised our parental leave policies to shift both the responsibility and stigma of pregnancy away from the 'child bearer' and instead make childcare a business issue, not a gender one.

> "I feel a personal duty to make sure we are not single-minded in our search for financial success.
>
> Paul Nixon, CEO LGT Wealth Management US

Half-year results 2026: steady progress in a changing environment

In the first half of 2026, LGT continued to demonstrate the resilience of its international private banking and asset management group.

+6.4%	+7%	+17%
CHF 12.3 bn	CHF 412.6 bn	CHF 281.6 m
Net asset inflows	Assets under management	Total operating income

In market conditions shaped by geopolitical tension, economic uncertainty and heightened volatility, the Group achieved broad-based growth while maintaining a disciplined approach to costs. For clients, this combination of financial strength, prudent management and long-term focus offers reassurance when navigating an uncertain environment.

Operating income increased by 5% to CHF 1.49 billion, led by a 7% rise in service income. With operating expenses increasing by 2%, the cost-income ratio improved to 73.3%. Group profit rose 17% year-on-year to CHF 281.6 million. LGT also retained a strong capital and liquidity position, with a CET1 capital ratio of 18.0%.

Growth and financial discipline

Assets under management rose to CHF 412.6 billion as at 30 June 2026, supported by CHF 12.3 billion in organic net new asset inflows, positive investment performance and currency effects. Both private banking and asset management contributed to this development, reflecting the enduring trust clients place in LGT's advisory and investment expertise.

> **"Our unique ownership structure provides us with a strong foundation and truly long-term perspective, as well as continuity and stability for our clients.**
>
> Heinrich Henckel, CEO LGT Wealth Management

A long-term commitment to markets and clients

These results coincide with meaningful milestones across LGT's international footprint: 40 years in Hong Kong, ten years of LGT Wealth Management under LGT ownership, and five years of LGT Private Banking in Japan. Together, these anniversaries reflect the Group's steady approach to building local relationships and capabilities over time.

They also underline the benefits of LGT's long-term, family-owned perspective and its established presence across key markets. Following recent investments in people, technology and growth, LGT remains focused on deepening its capabilities in existing markets, realising the potential of its international platform and continuing to serve clients with care and consistency.

While the external environment remains difficult to predict, LGT enters the second half of the year with a solid foundation and a clear commitment to sustainable, long-term value creation.

> **"With our very good results for the first half of 2026, LGT is continuing on its successful trajectory.**
>
> H.S.H. Prince Max von und zu Liechtenstein, Chairman LGT

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