Wealth
Management US

US connected clients
Portfolios

Looking after the wealth of our US connected clients

A specialist subsidiary of wealth management firm LGT Wealth Management UK LLP, 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 reside. LGT Wealth Management US Limited is authorised and regulated by the Financial Conduct Authority in the UK and a Registered Investment Adviser with the Securities & Exchange Commission in the US.

Our Philosophy

We believe that a global perspective is the best way to achieve a clients' goals. Our aim is therefore to make sure we meet a clients' investment objectives in a way that is efficient wherever they reside, avoiding the many pitfalls that can present themselves to internationally mobile individuals.

Our Services

Discretionary portfolio

- Discretionary investment service
- Clients delegate all investment decisions and day-to-day management
- Currency exposure, tax constraints and lifestyle requirements taken into account
- Full UK and US tax reporting

Advisory portfolio

- For clients who prefer to be involved with both the investment strategy and the day-to-day decisions
- With an understanding of a client's objectives and sensitivity to risk we will match investment ideas accordingly
- No transaction will be executed without a client's prior agreement
- Full UK and US tax reporting

Model Portfolio Service

- Discretionary investment service
- Six diversified and risk managed model portfolios
- Available in GBP, USD and EUR (Balanced)
- Ethical model portfolio
- Full UK and US tax reporting

Clients can rest assured in the knowledge that the investment decisions we make take into account the tax implications and constraints that go part and parcel with their unique circumstances. Furthermore, our expertise in this area means that we can help implement investment strategies that are tax efficient to both US and UK tax systems. To assist clients with their tax reporting obligations we provide separate tax packs for the different tax years the two nations operate.

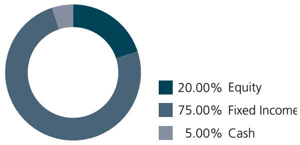
- We understand the similarities and differences between the two tax systems and structure portfolios accordingly.
- We understand that different investments hold a different appeal depending on a client's background, which is why we create investment strategies specifically tailored to their tastes.
- We are hands-on when it comes to managing portfolios. Our rigorous investment process means we do not invest in anything we do not believe in.
- Our team is dedicated to helping clients on both sides of the Atlantic, using a transparent fee structure, and focusing on achieving their individual investment goals.

Model Portfolio Service

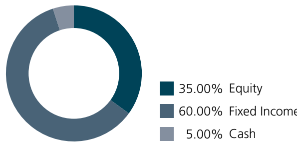
Our model portfolio service provides clients with a US compliant discretionary investment portfolio that takes into account the constraints and opportunities in both the US and UK.

We have a range of model portfolios available in GBP and USD, ranging from defensive to adventurous. We also have an Ethical investment strategy. Each portfolio is actively managed to achieve its investment objectives.

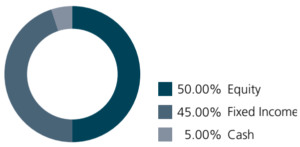
Defensive portfolio
The primary objective of this portfolio is to preserve capital. The portfolio is diversified across a range of asset classes but with a low overall allocation to equities (with a neutral allocation of 20% to the asset class).



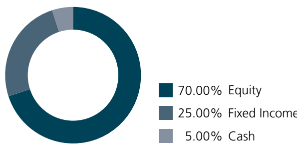
Cautious portfolio
The primary objective of this portfolio is to achieve a moderate level of capital growth. The portfolio is diversified across a range of asset classes with low-to-medium allocation to equities (with a neutral allocation of 40% to the asset class).



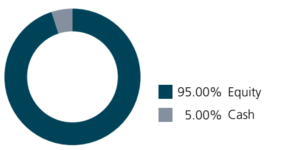
Balanced portfolio
The primary objective of this portfolio is to achieve capital growth in excess of inflation. The portfolio is diversified across a range of asset classes, with a medium allocation to equities (with a neutral allocation of 55% to the asset class).



Growth portfolio
The primary objective of this portfolio is to achieve above average capital growth. The portfolio is diversified across a range of asset classes, with a medium-to-high allocation to equities (with a neutral allocation of 75% to the asset class).



Adventurous portfolio
The primary objective of this portfolio is to achieve a high level of capital growth. The portfolio is diversified across a range of asset classes, with a significant allocation to equities (with a neutral allocation of 100% to the asset class).



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Important Information

LGT Wealth Management US Limited is a registered Company in England & Wales, registered number 06455240. Registered Office: 14 Cornhill, London EC3V 3NR. Wealth Management US 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.

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