The illustrations in this publication are part of the Princely Collections. For more than 400 years, the Princes of Liechtenstein have been passionate art collectors. The Princely Collections include key works of European art stretching over five centuries and are now among the world’s major private art collections. The notion of promoting fine arts for the general good enjoyed its greatest popularity during the Baroque period. The House of Liechtenstein has pursued this ideal consistently down the generations. We make deliberate use of the works of art in the Princely Collections to accompany what we do. For us, they embody those values that form the basis for a successful partnership with our clients: a long-term focus, skill and reliability.

www.liechtensteincollections.at

---

**Detail from “Landscape with the Young Tobias”, 1598**

Jan Brueghel the Elder’s “Landscape with the Young Tobias” shows a merry company in an imaginary riverside setting. Tobias, on the advice of his companion, the Archangel Raphael, pulls a fish out of the water. He will use its gall to cure his father’s blindness. The real subject here, however, is the meticulously painted landscape into whose depths the composition leads the viewer’s gaze. The break in the forest and the course of the river lead one’s gaze to the centre of the picture. Beyond it, reality fades into the atmospheric distance. The impression of depth is achieved by the considered use of colour: it gradually diminishes in intensity as it moves away from the colourful figures in the brown foreground via the green forested area in the middle distance to terminate in the blue haze into which the mountains disappear.

© LIECHTENSTEIN. The Princely Collections, Vaduz–Vienna

---

**A look inside the Princely Collections**

The illustrations in this publication are part of the Princely Collections. For more than 400 years, the Princes of Liechtenstein have been passionate art collectors. The Princely Collections include key works of European art stretching over five centuries and are now among the world’s major private art collections. The notion of promoting fine arts for the general good enjoyed its greatest popularity during the Baroque period. The House of Liechtenstein has pursued this ideal consistently down the generations. We make deliberate use of the works of art in the Princely Collections to accompany what we do. For us, they embody those values that form the basis for a successful partnership with our clients: a long-term focus, skill and reliability.

www.liechtensteincollections.at
Welcome to LGT Vestra
Our company at a glance
Interview: “Long-term thinking is part of our identity”
Two sides, one story
Stability
Trust
Flexibility
Expertise
Commitment
Our services
Contact
“The word ‘Vestra’ is Latin for ‘Your’, and indicates our understanding that it is your money we have been entrusted with, a privilege we never take for granted.”

David Scott, Chairman LGT Vestra
Welcome to LGT Vestra

Dear Client

Welcome to LGT Vestra. Our focus is on ensuring we meet and exceed our clients’ expectations, which in turn defines our firm’s culture and strategy. We treat every client relationship as a long-term partnership and value the personal connection we hold with each one.

Our firm was founded in 2008 to provide a transparent offering, free from any conflicts of interest that could impact negatively on our clients. The word “Vestra” is Latin for “Your”, and indicates our understanding that it is your money we have been entrusted with, a privilege we never take for granted.

Our private ownership structure enables us to take a long-term approach to business decisions. We can afford to make investments in our business that we believe will enhance the experience of our clients without worrying about the short-term impact on profits. Our partnership in 2016 with LGT, wholly owned by the Princely Family of Liechtenstein, has allowed us to continue under private family ownership. Our entrepreneurial approach, together with LGT’s financial stability, enables us to make decisions that we believe will provide long-term benefits for our clients.

Our obsession is ensuring our clients enjoy being clients of the firm. We continually strive to ensure that we never take our clients for granted and always remember that we must continuously earn the right to look after our clients’ wealth.

David Scott
Chairman LGT Vestra
LGT Vestra is a UK-based partnership between LGT and the executive partners of LGT Vestra. LGT is the world’s largest private bank and asset manager owned by a single family, the Princely House of Liechtenstein, for over 80 years.

Private ownership means we take a long-term approach to wealth management, avoiding short-term actions that may compromise the stability of our firm, and crucially the trust of our clients.

Long-term strategy and holistic approach
Thanks to our efficient management and organisational structure, we are able to make decisions quickly and independently. As a company and an investor, we take a long-term holistic approach, and are actively involved in promoting the sustainable development of society and the environment.

Conservative balance sheet and financial stability
LGT has a healthy balance sheet, a high level of liquidity and is well capitalised. Our equity capital is significantly above the minimum regulatory requirement and reflects the financial strength of our company, including international comparison.

Investment expertise dedicated to serving our clients
We combine an in-depth perspective of our clients’ needs with an active approach to investment management. With access to the key international investment and financial centres, we can identify and realise attractive investment opportunities around the world. When it comes to structuring and managing portfolios, our clients benefit from the extensive capabilities of our specialists.

LGT Group: financial highlights as at 31 December 2017

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assets under administration</td>
<td>CHF million 201 782</td>
</tr>
<tr>
<td>Total assets</td>
<td>CHF million 41 893</td>
</tr>
<tr>
<td>Equity capital</td>
<td>CHF million 4 113</td>
</tr>
<tr>
<td>Total operating income</td>
<td>CHF million 1 529</td>
</tr>
<tr>
<td>Group profit</td>
<td>CHF million 283</td>
</tr>
<tr>
<td>Headcount</td>
<td>3 118</td>
</tr>
</tbody>
</table>

Moody’s/Standard & Poor’s ratings for LGT Bank Ltd., Vaduz Aa2/A+

LGT Vestra: financial highlights as at 31 December 2017

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assets under administration</td>
<td>GBP million 10 015</td>
</tr>
<tr>
<td>Private client assets under administration</td>
<td>GBP million 6 910</td>
</tr>
<tr>
<td>Institutional assets under administration</td>
<td>GBP million 3 110</td>
</tr>
<tr>
<td>Headcount</td>
<td>293</td>
</tr>
</tbody>
</table>

Our range of services

- Portfolio management services for private and institutional clients
- Wealth planning
- Securities and exchange trading
- Investment advisory
- Financing and loans
**International presence with a local foothold**

Whether in Liechtenstein, Switzerland, Austria, the United Kingdom, Singapore, Hong Kong or Dubai: we have a foothold on the ground and will serve you locally.

We offer our private clients access to a range of international booking centres, irrespective of their domicile. Group-wide, we employ over 3000 staff in over 20 locations in Europe, Asia, the Americas, Australia and the Middle East.

---

**Europe**
- Principality of Liechtenstein, Vaduz
- Austria, Salzburg, Vienna
- France, Paris
- Ireland, Dublin
- Switzerland, Basel, Berne, Davos, Geneva, Lugano, Pfäffikon, Zurich
- United Kingdom, Bristol, Jersey, London

**America**
- United States, New York

**Asia**
- China, Beijing
- Hong Kong SAR
- Japan, Tokyo
- Singapore

**Australia**
- Sydney

**Middle East**
- Bahrain, Manama
- United Arab Emirates, Dubai

For all LGT locations, please visit: www.lgtvestra.com
“Long-term thinking is part of our identity”

Why corporate culture and values are important for LGT.

Your Serene Highnesses, despite what has been a challenging environment for the sector, LGT has been very successful over the last few years. What is your secret to success?

H.S.H. Prince Max: Our strong results show that we have done a lot of things right in the past. We have a clear strategy and have been very disciplined in our focus on Private Banking and Asset Management; with the result that we have expanded internationally in both segments. An outstanding team and good processes are prerequisites if you want to successfully implement a strategy, and a certain amount of luck helps too.

H.S.H. Prince Philipp: Our culture also plays an important role in our success. It is entrepreneurial, very long-term in its approach and places our clients at the centre of what we do. Our clients sense that, which is something I have observed in numerous discussions with them. Many of our clients are entrepreneurs themselves and therefore prefer to talk about their investments with a bank that is managed by an entrepreneurial family.

Your family has owned LGT for more than 80 years. As private banking consolidates, the model of privately owned banks appears to be coming under pressure. Is going public a conceivable option for LGT?

H.S.H. Prince Max: No, our private structure has too many benefits: we have rapid decision-making channels, stability in our management structure and continuity in terms of our strategic focus. I don’t see any need to change anything here. We are extremely well capitalised and our family is a financially solid owner, which could invest further funds if necessary. The traditional reasons for going public do not apply in our case.

H.S.H. Prince Philipp: As a general rule, external shareholders have two objectives, i.e. high dividends and a rising share price. In most cases, this mindset creates a focus on the short term. However, as a family, we can think and act in a long-term manner. Let me give you an example: During the Asian crisis at the end of the 1990s, many banks scaled back their activities in the region. We, on the other hand, said: “Now more than ever!” and expanded our Asian business further. Today, this decision is benefiting us greatly. And this is why I always say that we are not sprinters, but marathon runners.

To what extent is the private ownership of LGT also important for your clients?

H.S.H. Prince Max: Besides stability and security, our clients also expect excellent service and a positive investment performance, of course. Many clients rightly regard the ownership structure, which has remained unchanged for more than 80 years, as an important basis for our consistent strategic focus and our corporate success. In the fast-paced business of banking, in particular, which is full of short-term temptations, a stable ownership structure with a long-term focus is a major advantage. Many clients have a keen interest in understanding the particular design of our ownership structure. In contrast with other private companies, the relationships at LGT are remarkably straightforward. All shares are held in a foundation, the purpose of which is not limited in terms of time. Our clients also often tell us how they appreciate the clear family profile, which has been developed over generations and which we can hopefully continue to good effect.
H.S.H. Prince Philipp: I would like to highlight, in particular, the aspect of common interests between owners and clients. For a private bank, it’s fairly unique that clients can invest in the same investment strategies and solutions as the owners. This means that both parties are in the same boat and share an interest in terms of good performance. At LGT, we have assimilated this principle. As a bank, we grant portfolio management mandates to external fund managers in a range of different asset classes and investment instruments. We too would never consider using a fund manager who didn’t invest a substantial share of his private assets into his own strategy.

Which issues will you and LGT be focusing on most intensively over the next few years?

H.S.H. Prince Max: The last ten years were characterised by the strong and certainly in part, necessary reactions to the last global economic crisis. These were driven primarily by financial regulators and central banks. I expect that we will continue to see a changing and dynamic environment over the next ten years, but I suspect that the main drivers thereof will be different. My guess is that technological developments will further accelerate, reactions to the mounting environmental problems will become stronger and that we will face even larger political challenges, which are already being foreshadowed by the rising social and political polarisation.

H.S.H. Prince Philipp: There are a number of unfavourable developments that are likely to concern not only us as a bank, but also investors and society as a whole. These include government debt, which is still much too high in many countries, and the issue of the financial viability of our current pension system. I also see a danger of over-regulation in the banking sector if well-intended rules for the protection of the system and investors prove not to be differentiated enough, or even worse, to be counterproductive.

The line of descent of the Princely Family of Liechtenstein began with Heinrich I of Liechtenstein (1216–1265), who obtained the Lordship of Nikolsburg in South Moravia as free property 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 raised to the rank of the Imperial Principality of Liechtenstein. Today, the Principality of Liechtenstein is a constitutional monarchy and sovereign state at 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. The Princely Family plays an active political role and has numerous business activities. It is a keen advocate of art and science and champions welfare. www.fuerstenhaus.li
“Investment decisions are driven by hopes, fears and dreams as much as by facts and analysis.”

David Scott, Chairman LGT Vestra
Two sides, one story

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.

These are tasks at which the rational, left-hand side of our brains excel and they are the essence of our wealth management process. But they are only half the story.

Investment decisions are driven by hopes, fears and dreams as much as by facts and analysis. We realise that wealth has social and human dimensions that are nurtured by the emotional right-hand side of our brain.

Understanding the full picture, looking at it from left and right, is what we do at LGT Vestra. We share your wish to reach a greater understanding of your wealth planning needs. Empowering you to realise your unique aspirations is the objective of our relationship.

---

**Working with the Princely Collections**

For more than 400 years, the Princes of Liechtenstein have been passionate art collectors. The Princely Collections include key works of European art stretching over five centuries and are now among the world’s major private art collections. We make deliberate use of the works of art in the Princely Collections to accompany what we do.

The following pages introduce our cornerstones. We have chosen artworks from the Princely Collections to help bring to life the two sides of our wealth management ethos, the emotional and the rational.
Pompeo Girolamo Batoni, workshop, detail from “Double portrait of Emperor Joseph II and his brother Leopold, Grand Duke of Tuscany”, 1769
We are one of the few global wealth management firms in private ownership. Founded in 2008, we are a UK-based partnership between LGT, wholly owned by the Princely Family of Liechtenstein, and the executive partners of LGT Vestra.

We have access to a range of international booking centres and have offices in the world’s key financial markets. Our private ownership ensures a long-term outlook and financial stability, which together with a shared vision, creates the essence of our business.
Our fresh approach to wealth management focuses on building lasting partnerships with our clients and their families, developing trust through transparency in all of our actions, and maintaining our entrepreneurial spirit. As a result, we always take a long-term approach to our decisions, avoiding short-term actions that may compromise the stability of our firm, and crucially, the trust of our clients.

“Our private ownership ensures a long-term outlook and financial stability, which together with a shared vision, creates the essence of our business.”
– Stability
Natale Schiavoni, detail from “portrait of Prince Johann von Liechtenstein in the circle of his family”, 1817.
We stand by our beliefs and will only invest with conviction. By looking at the whole investment market, we ensure the advice we give is impartial and most appropriate for you. We operate for our clients – sales targets do not drive us. Our fees are always transparent, and we take full responsibility for managing your portfolio and monitoring risk. We want nothing to cloud our judgement or colour our advice because trust is paramount.
Our people are our brand and they uphold the values of honesty and integrity at all times. We never lose sight of the fact that it is your money in our care. If we do not manage your portfolio to the best of our ability and in line with your expectations, then we do not deserve to manage it at all.

“We want nothing to cloud our judgement or colour our advice because trust is paramount.”
– Trust
Peter Paul Rubens, detail from "Décis Mus relating his dream." 5616.17
Flexibility

Our investment offering for direct clients is bespoke. We build your portfolio based on the direction you want to take and what you want to achieve aligned with the level of risk you are prepared to take.

The core element of our philosophy is disciplined asset allocation across the full spectrum of asset classes and the permanent risk monitoring of portfolios. Our processes are based on achieving your goals while working entirely within your risk parameters.
We know there is a sliding scale in all of us, one that moves between the desire for complete control and our wish to take a step back.

Granting you the freedom to choose the level of investment that suits you is fundamental to how we manage your wealth. Striking the appropriate balance between risk and return is essential. Our process starts with you and ends with your portfolio.

“Our processes are based on achieving your goals while working entirely within your risk parameters because we know there is a sliding scale in all of us.”
— Flexibility
Elisabeth Vigée-Lebrun, detail from “Portrait of Princess Karoline von Liechtenstein as Iris”, 1793
Francesco Casanova, detail from “Equestrian portrait of Prince Wenzel Anton Kaunitz-Rietberg (1711–1794)”
The ethos of our business has allowed us to attract some of the best talent in our industry, drawing together in-depth experience from multiple disciplines. We pride ourselves on our team’s technical capability, knowledge and skills.

Along with this, they share a strong sense of collaboration. We believe knowledge pooled fosters more intelligent, more informed decisions. The highest levels of professionalism are essential.
We also understand the importance of strong personal skills. While our backgrounds may be different, we share a defined set of values: a friendly, open attitude to client relationships, a willingness to embrace new ways of working and a desire to work towards our clients’ best interests. This allows us to provide personal and actionable advice so you can make the most informed decisions for the long term.

“The highest levels of professionalism are essential yet we also understand the importance of personal skills.”
– Expertise
Johann Dallinger von Dalling the Elder, detail from "White horse being shod, with the Liechtenstein coat of arms in the background", around 1740.
Commitment

The increasingly complex world of investment demands increasing levels of specialisation. Our Investment Committee analyses the macroeconomic outlook with an eye on the future and determines an overall asset allocation as a guide to our investment managers. This is coupled with our specialist committees, which assess all asset classes, determining the optimum implementation options. This coordinated approach helps your investment manager to focus on you, implementing only what is right for you.
We know there is no typical client. Every single one is unique and we strive to deliver a personalised service to match your individual situation. Your investment manager and their team will focus on your requirements and tailor solutions to your needs. We fit the portfolio to you, never the other way around.

“Our committed approach helps your investment manager to focus on you, implementing only what is right for you.”
– Commitment
Natale Schiavoni, detail from "Princess Sophie von Leuchtenstein (1798–1869) and Vincenz Count Esterházy-Galantha (1781–1835) in a park next to an Eros statue", 1817.
“A wealth of skills but a single philosophy.”

David Scott, Chairman LGT Vestra
Our investment philosophy is simple. With a mind on what has happened in the past, we look ahead to assess what may happen in the world, gauging the possible impacts of events on future returns.

The world is changing fast and asset classes that may have performed well in the past may not do so in the days and years ahead, especially in a low interest rate environment.

We look for areas of the market that we believe will respond well to future economic and political stimuli and allocate the portfolio weightings accordingly. We have always striven to reduce the opacity of the investment industry. We believe that many overly complex investments rarely deliver positive outcomes for clients. Often they are designed to meet the needs of the firm selling them with little regard for the investor.

As our role is to invest on your behalf, quite simply, if we cannot understand how an investment can provide benefits to you, we will not use it. We are unlikely to hold investments or invest in a geographic area simply because a benchmark does. We invest where we believe we will add value to you, either to mitigate risk or to deliver a positive return over the expected period.

We are conscious that risk has different meanings to different people. It might mean the loss that could occur, an investment not keeping pace with inflation, or a lack of liquidity when you need it. It is our job firstly to ensure that we understand what it means for you and then to try to deliver the right outcome.

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

Our approach is simple. We offer informed, objective advice based on your aspirations and calibrated against the level of risk you are comfortable with. We create a bespoke portfolio to meet your requirements. We recognise that everyone has their own preference as to how they wish their money to be managed, so we allow you to choose precisely how involved you are with the daily management of your assets:

Discretionary Portfolio
Our investment process defines the structure of these portfolios, but the day-to-day management is given to your personal investment manager. This is the choice for clients who wish to delegate all investment decisions to someone else.

Advisory Portfolio
Maybe you prefer to be more involved with both the investment strategy and the daily decisions. Your investment manager will have an understanding of your objectives and sensitivity to risk, and will match investment ideas accordingly. No transaction will be executed without your prior agreement.

Execution Only Portfolio
This enables you to retain full control over your investments by making use of our dealing and custody service.
Private Office
A well-run company has a clear view of the road ahead. Shouldn’t a family have the same?

Our Private Office delivers a fully outsourced family office service that goes beyond investment decisions to address the full range of your family’s needs. Made up of professionals with wide ranging backgrounds from accounting to investment banking and law, our team offers a genuinely holistic and highly distinctive service. Think of us as an outsourced family office, one that is fully dedicated to serving you and the people you most care about.

We believe – and experience confirms – that offering a service in the round relieves the burden on family members dealing with issues as diverse as investment and legacy planning. We help add structure and clarity to family affairs, particularly where the divergent interests and priorities of several stakeholders has led to overwhelming confusion and complexity.

Our team works collaboratively with each other, and with you, bringing decades of experience to bear across the three pillars of our service: wealth strategy, investing and illiquid assets. We can take care of the minutiae, at the same time presenting you with honest, actionable advice to help you deal with the day-to-day as well as plan with confidence for the long term.

Wealth Planning
A dream without a plan remains a dream

This service is dedicated to the provision of financial planning to individuals, companies, partnerships and trusts. We present you with a personalised strategy to structure your short, medium and long-term plans, all within the parameters of your financial resources. Our comprehensive proposition endeavours to help you meet and maintain your ambitions. We have the specialist expertise and experience to guide you through the financial landscape to effectively implement a plan that will meet your financial goals.

Our proactive and long-term approach with clients means we periodically review the progress of your recommended strategy and can discuss any changes needed as a result of legislation, or your personal circumstances. When providing advice we consider the whole of the relevant market to identify the solutions which best suit you.

We are happy to work closely with your other professional advisers, such as tax or legal advisers, to ensure that we are all working in your best interests.

Our service includes advice in the following areas: pension accumulation and retirement planning, inheritance tax planning and devolving wealth to future generations, providing for school fees and assisting non-UK domiciled and non-resident clients to arrange their affairs in a tax compliant manner. Through our US subsidiary, we provide specialist services for clients with North American connections.
Defined Benefit Pension Schemes
A uniquely defined approach, for your benefit

We appreciate every pension scheme has its own unique set of circumstances. Therefore we take the same bespoke approach as with our individual clients.

Our dedicated team offers specialist advice to trustees and their professional advisers with the main point of contact always being the decision-maker, someone with a specialist knowledge of defined benefit pensions.

We work closely with you to gain a comprehensive insight of the scheme’s liability and cash flow profile, the appetite and capacity for risk and the strength of the supporting sponsor covenant. We will agree a relevant benchmark or targeted return objective with you. Our ongoing strategic guidance ensures a close partnership as we work to meet your specific requirements.

Our dedicated focus is not only on the results but on you, the trustee.

Institutional Portfolios
The clarity of an independent observer, with the understanding of an intimate insider

No two institutional clients are the same. Whether the client is a financial mutual, not for profit organisation, general insurer or charity, we take the same bespoke approach as with our private clients. The specialist advice we offer through our dedicated team is based on gaining an intimate knowledge of your organisation, however large it may be. Understanding your firm’s history, ambitions and culture is crucial as we view the investment portfolio in the wider context of your business.

As a result, our clients appreciate not only the results, but the personal, intangible element of the relationship.

We know that equity, alternatives and fixed-interest investment management are very different disciplines and therefore require particular expertise. Our team has specialists in each class working together to deliver a cohesive approach for the benefit of your stakeholders.

We recognise that efficient allocation of working capital is a key priority, particularly for our clients from the insurance sector. By working in partnership with our clients and their actuary, we seek to ensure our investment strategy achieves the most effective capital allocation for Solvency Capital Requirements. We provide a bespoke reporting suite, including a full Solvency II solution, which is clear, consistent and timely.
International
An international reach with an individual focus

Our bespoke international wealth management service provides access to our best investment thinking, specifically structured for UK resident non-domiciled clients, and non-UK resident clients.

We work with international private individuals and families with complex financial affairs providing a personal service, focused on attention to detail. Our approach is tailored to each client. We pride ourselves on providing impartial advice and transparency with our fees. Our multi-platform custodial arrangements allow jurisdictional diversification based on each client’s personal requirements.

However unique your requirements, whether they are investments, loans (Lombard or real estate), banking or advice, we are able to tailor a solution to your needs. We are able to work with any professional advisers you already have relationships with, to coordinate your financial affairs.

Alternative Investments
The road less travelled can be the road more rewarding

We can help you to unlock investment opportunities in private equity and commercial property. Whether you’re a high-net-worth individual or a professional investor, our specialist team will help you to gain access to direct investment opportunities in these often rewarding sectors.

We source and research new and existing unlisted investment opportunities. We also bring together clients who share an appetite for a particular asset or opportunity to create bespoke investments.

We have a pool of experienced business people to help us validate opportunities. And as entrepreneurs ourselves, we appreciate better than many the issues facing investors in new ventures.
Offshore
Wealth may be offshore, but it should never be all at sea

Our investment managers in Jersey have extensive offshore wealth management experience. From Jersey we offer wealth management services primarily to the international market. We work with international and UK private clients, fiduciaries, pensions, institutions and charities.

Our global investment services are available in all major currencies, providing clients with a focused discretionary portfolio management service. We understand that your requirements are unique to you. In addition to providing our discretionary and advisory portfolio services, we also offer a private client broking service. We work with an experienced team of private client stockbrokers to provide bespoke advisory and execution investment services.

Our offshore model portfolio service for advised clients of professional advisers, can be accessed through our own custodian arrangements or via one of the leading offshore platform providers. Our primary focus is to meet your objectives through an unconstrained investment approach, with an emphasis on delivering attractive risk adjusted returns.

LGT Vestra US
While the world shrinks, our ambitions expand

LGT Vestra US is a specialist subsidiary of wealth management firm LGT Vestra LLP, set up specifically to help clients with personal and financial connections to the US. We help our clients to overcome the jurisdictional constraints of managing their wealth wherever they reside.

We believe that having a global perspective is the best way to achieve our clients’ goals. That is why we offer two ways of investing that have an international approach at their core. We offer a bespoke solution tailoring the portfolio to your individual requirements and risk profile, taking into account currency exposure, tax constraints and your lifestyle requirements.

Where appropriate we also offer a model portfolio service that provides a cost-effective investment solution via a range of risk-rated models that take into account global investment constraints.

Our international expertise means that we can help construct and implement investment strategies that are tax efficient under both US and UK tax systems. To assist with your tax reporting obligations, we provide separate tax packs for the different tax years.

We are authorised and regulated by the Financial Conduct Authority in the UK and are a Registered Investment Adviser with the Securities & Exchange Commission in the US.
Important information


LGT Vestra (Jersey) Limited is incorporated in Jersey and is regulated by the Jersey Financial Services Commission in the conduct of Investment Business. LGT Vestra US Limited (“LGT Vestra US”) is a registered Company in England & Wales, registered number 06455240. Registered Office: 14 Cornhill, London EC3V 3NR.

LGT Vestra 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.

This publication is marketing material. It is for information purposes only. Certain services described herein are not available to retail clients as defined by the FCA or the JFSC, as applicable; please speak to your investment adviser for further clarification in this regard. The wording contained in this document is not to be construed as an offer, advice, invitation or solicitation to enter into any financial obligation, activity or promotion of any kind. You are recommended to seek advice concerning suitability from your investment adviser. Any information herein is given in good faith, but is subject to change without notice and may not be accurate and complete for your purposes. This document is not intended for distribution to, or use by, any individual or entities in any jurisdiction where such distribution would be contrary to the laws of that jurisdiction or subject any LGT Vestra entity to any registration requirements. When we provide investment advice it is on the basis of a restricted approach that is to say, whilst we review and advise on retail investment products from the whole of the investment market and can also advise on direct investments, we will not consider your wider financial planning and pension requirements, unless you wish us to do so when we will refer you to one of our wealth planners.

Investors should be aware that past performance is not an indication of future performance, the value of investments and the income derived from them may fluctuate and you may not receive back the amount you originally invested.

In London
LGT Vestra LLP
14 Cornhill
London
EC3V 3NR

In Bristol
LGT Vestra LLP
15 Queen Square
Bristol
BS1 4NP

Our American specialists
LGT Vestra US Limited
14 Cornhill
London
EC3V 3NR

In the Channel Islands
LGT Vestra (Jersey) Limited
Charles Bisson House
30-32 New Street
St. Helier, Jersey
JE2 3TE

Our number: +44 (0)20 3207 8000
Our website: www.lgtvestra.com

In London
LGT Vestra LLP
14 Cornhill
London
EC3V 3NR

In the Channel Islands
LGT Vestra (Jersey) Limited
Charles Bisson House
30-32 New Street
St. Helier, Jersey
JE2 3TE

Our American specialists
LGT Vestra US Limited
14 Cornhill
London
EC3V 3NR

Our number: +44 (0)20 3207 8000
Our website: www.lgtvestra.com
“We value each of our clients and put their interests at the heart of our business.”

David Scott, Chairman LGT Vestra