



January 2018



## A Fresh Approach

LGT Vestra is a partnership set up by experienced industry professionals to provide an exceptional wealth management service to private clients, companies, charities, trusts and financial intermediaries. We offer a personal, focused and bespoke service, carefully designed around your best interests.

### Our Philosophy

Our aim is to offer a fresh approach to Wealth Management, by putting clients first, we do this through the provision of a high quality service, with a transparent charging structure, designed in a bespoke manner to fit their individual requirements.

We have been turning our vision into reality, attracting some of the best talent in the industry and drawing together a wealth of experience across multiple asset classes.

### LGT Vestra (Jersey) Limited

In order to cater for those clients requiring a truly "Offshore" investment service and recognising the opportunities presented by the highly rated and regulated jurisdiction of Jersey, we established a 100% owned subsidiary in 2008 with a full physical presence following in 2010. Since then, the team has grown in number following the addition of long standing experienced investment managers, who are well known in the local market as well as internationally. The team in Jersey has extensive experience in managing assets for private clients, fiduciaries, charities and both local and international pension schemes.

### Our Services

Our clients can choose how much involvement they have with the management of their investment portfolios.

#### Discretionary Portfolio

Our Discretionary Portfolio Management Service is appropriate for clients who wish to delegate all investment decisions to us. Our investment process defines the structuring of these portfolios, with the day to day management looked after by each client's Investment Manager.

#### Advisory Portfolio

Our Advisory portfolio management service is for clients who wish to become more involved with the investment strategy and with all decisions made on their portfolio. The Investment Manager will have an understanding of each client's objectives and levels of risk, and will communicate investment ideas to meet these objectives. However, no transactions will be executed without the prior agreement and instruction from the client.

#### Private Client Broking

We understand that each person has their own unique financial goals and circumstances. With that in mind, our highly experienced team of private client stockbrokers provide a professional and bespoke investment management service, advising on a diverse range of securities listed on most of the world's main stock markets.

## **What makes us different?**

- We value each of our clients and put their interests at the heart of our business
- We are transparent with our fees and in our investment recommendations
- We do not believe in jargon and try to communicate in the way which all our clients understand
- We do not manufacture or sell in-house products
- We continue to search for ways to improve our service

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### **Important information**

LGT Vestra (Jersey) Limited is regulated by the Jersey Financial Services Commission. Our registration details are set out in the JFSC Register: Firm Reference No: IB0263 [http://www.jerseyfsc.org/investment\\_business/regulated\\_entities/index.asp](http://www.jerseyfsc.org/investment_business/regulated_entities/index.asp). Registered in Jersey: 102243. Registered office: Charles Bisson House, 30-32 New Street, St. Helier, Jersey, JE2 3TE. This publication is marketing material. It is for information use only. 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 advisor. 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. The 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 LGT Vestra (Jersey) Limited to any registration requirements.