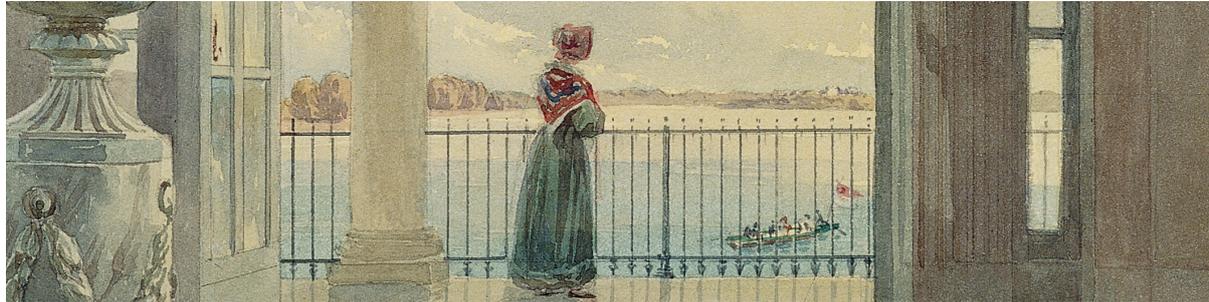


January 2018



Unbiased Advice

The LGT Vestra Wealth Planning team are dedicated to the provision of comprehensive financial planning advice to individuals, companies, partnerships and trusts.

About Wealth Planning

Our comprehensive financial planning approach helps ensure your ambitions remain on track. We work with you to create a bespoke financial plan, designed around your individual needs, offering long-term guidance. We will consider the whole of the market in order 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:

1. A trusted relationship between you, your planner and your paraplanner.
2. An in-depth knowledge of your aspirations, your family and your business.
3. Analysis of your lifetime cash flow, your attitude to risk, the impact of not fulfilling your financial needs, the affordability of proposals.
4. The aggregation of your financial plans.

Services

Our service includes advice to you in the following areas:

- Cash flow analysis
- Psychometric risk profiling
- Retirement planning
- Pension aggregation
- Income tax planning
- Inheritance 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.
- Specialist services for US connected clients
- Venture Capital Trust, Enterprise Investment Scheme & Business Property Relief advice

Key Features

- 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
- High level of service and support to you at all times
- Clear and transparent reporting
- Competitive and transparent fees

LGT Vestra LLP

14 Cornhill
London
EC3V 3NR
www.lgtvestra.com

Important information

LGT Vestra LLP is authorised and regulated by the Financial Conduct Authority. Our regulation details are set out in the FCA register: Firm Reference No: 471048 www.fca.org.uk/register. Registered in England and Wales: OC329392. Registered office: 14 Cornhill, London, EC3V 3NR.

This publication is marketing material. It is for informational purposes only. Certain services described herein are not available to retail clients as defined by the FCA; 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 LGT Vestra LLP 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 of 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.