Wealth Management

Wealth Planning

Unbiased Advice

LGT Wealth Management is part of the private banking and asset management group LGT, owned by the Princely Family of Liechtenstein. We challenge convention in our industry by offering a transparent wealth management service built around each client's needs. Our Wealth Planning team is 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

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Important information