Wealth
Management

LGT Wealth Help

A guidance manual

Forward-looking
for generations

Cover Image
Bauer brothers, Hortus Botanicus, detail from "Amaryllis belladonna," 1779
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Contents

LGT Wealth Support

LGT Wealth Support is available to offer any assistance that you may need when using the portal.

For any technical problems or usability issues, please contact the LGT Wealth Support Team on the below number or email your Investment Manager directly.

+44 (0)20 3207 8222
Monday to Friday 8am – 5:30pm (GMT/BST)

Getting started

How to register for LGT Wealth

Initially, please speak with your Investment Manager who can trigger the registration process for you. Once triggered, the registration process will begin. This process has been outlined below.

Step 1

Receive activation email
- You will receive an activation email from *noreply@lgt.com*
- Please follow the activation link that will take you to the secure LGT Wealth Registration page

Step 2

Load registration page
You will be prompted to enter:
- Your person code, as stated in the activation email
- Your date of birth
- Your surname

Step 3

Complete two factor authentication
- You will be asked to select the phone number that you would like your One Time Password to be sent to. In the case of landlines, the password will be read aloud to you
- Please enter this One Time Password into the box to complete your two factor authentication

Step 4

Create login details
- You will need to create a unique username and password
- Once registration is successful, you will be directed to the confirmation screen where you will then proceed to login

Navigating each section

Summary

The 'Summary' page provides a consolidated view of your portfolio(s) and accounts. In this section you can view your total portfolio value, performance, cash breakdown, asset allocation and your top holdings.

Holdings

Within the 'Holdings' section you can view your account information, view and export details relating to your holdings.

Cash Statements

Within 'Cash Statements' you can filters, search, customise and export your cash transactions.

Transactions

'Transactions' history allows you to view, filter and search your most recent and historical stock and fund transactions.

Documents

Access electronic copies of documents including your Valuations Report, Market Transaction Report, Contract notes, Year End Pack, Fee Invoices and Depreciation Notification. Search and filter for historical documents.

Messaging

Contact your Investment Manager directly and send and receive messages securely using the secure messages feature.

Settings

Within the 'Settings' section you can change your paperless.

Terminology explained

Export

Export views as a CSV or PDF file.

Unread only

Slide the 'Unread' button to the right until green to display only unread documents.

Scrolling

Select the left and right arrow keys to navigate through results.

Navigation

Use the arrow icon found at the bottom of each page to return directly to the top of the page.

Show/Hide

Click on the arrow symbol to show or hide details for a particular area.

Alerts

Click on the arrow symbol to show or hide details for a particular area.

Notifications

Pop ups will appear on the 'Summary' page when there is an unread message and or unread document.

Frequently Asked Questions

Login questions

Q. How do I register for LGT Wealth?

A. To register for LGT Wealth please contact your LGT Wealth Management Investment Manager.

Q. I have forgotten my username, what should I do?

A. To reset/change your username contact LGT Wealth Support.

Q. I have forgotten my password, what should I do?

A. Select the 'Forgotten password' link located on the login page and follow the instructions. Your password will be reset and you will be able to log in via the login page. If you are unable to reset your password please contact LGT Wealth Support.

Q. Why is the link in my 'Forgotten password' email not working?

A. The 'Forgotten password' link is disabled after 12 hours.If you have exceeded this time frame, please select follow the 'Forgotten password' process again and a new email will be sent to you. If you still are unable to reset your password, please contact LGT Wealth Support.

Q. I'm locked out of my account, what should I do?

A. To unlock your account please contact LGT Wealth Support.

Q. My One Time Password code has expired and I'm unable to request a new code, what should I do?

A. Please contact LGT Wealth Support.

Data questions

Q. I have a question about the data displayed in my account, who can I talk to?

A. Please contact your Investment Manager directly.

Q. My personal details are out of date or incorrect, how can I change them?

A. Please contact your Investment Manager directly.

Messaging questions

Q. How do I create a new message?

A. Select the 'Messages' option in the menu located at the top of the page and navigate to the new message button which is located at on the right of 'Messages' page. Select the button this will open up a new message for you to draft and send to your Investment Manager.

Please note regarding the content of a message: If you do not have transactional authority over an account, please do not request as such through the LGT Wealth portal. Both the Investment Manager and assistants will be vetting these and will decline any unauthorised requests.

Q. Can I attach documents to secure messages?

A. You can attach a document to your message using the attach button. Some unsafe file types are blocked, but we accept portable document formats (.pdf, .xps), Word (.doc,.docx), Excel (.xls, .xlsx), and picture files (.bmp, .jpg, .png).

Q. How can I search for a message in my inbox?

A. The search function located on the left of the 'Messages' page, allows you to search for a message using words that are in the email. In addition, the sort order filter allows you to sort your messages in both your inbox or sent items by date or subject.

Security tips

One Time Password (OTP)

It's important that you do not share your OTP number with anyone. This includes LGT Wealth Management staff; we would never request you to do this.

Fraud

If you suspect there has been fraudulent activity regarding your LGT Wealth account please contact LGT Wealth Support.

Threats to be aware of

'Clone firms' - This is an FCA term for individuals impersonating a Wealth Management company.
For more information visit: *www.fca.org.uk*

'Cold callers' - We will never cold call you, if you are ever in doubt put the phone down and contact us.

How to go paperless

Step 1

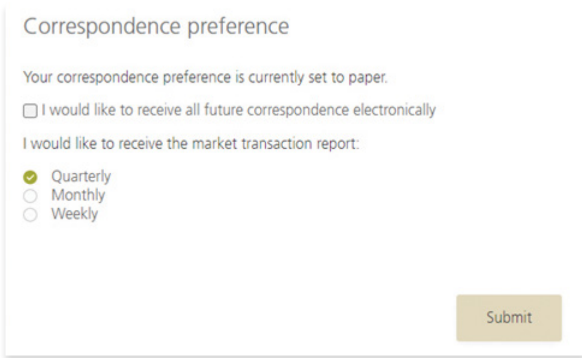
Login using your username and password.

Step 2

Navigate to settings icon in the top-right corner.

Step 3

Scroll down to the 'Correspondence preference' section.



Step 4

Select the 'I would like to receive all future correspondence electronically' tick box and click 'submit'.

Imprint

Image credits

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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.

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