US connected clients
Portfolios

January 2018

Looking after the wealth of our US connected clients

LGT Vestra US is a specialist subsidiary of wealth management firm LGT Vestra LLP, set up specifically to help clients with financial interests in both the US and UK. Authorised and regulated by the Financial Conduct Authority in the UK and a Registered Investment Adviser with the Securities & Exchange Commission in the US.

Our Philosophy

Our aim is to make sure we meet your clients' investment objectives in a way that is efficient in either country, avoiding the many pitfalls that can present themselves to people with challenges to face on more than one front.

Our Services

Discretionary portfolio

- Discretionary or Advisory Wealth Management Service
- Completely bespoke approach
- Full UK and US tax reporting
- Take into account currency exposure, tax constraints and lifestyle requirements

Model Portfolio Management Service

- Discretionary Investment Management
- Five different risk managed model portfolios
- Available in both GBP and USD
- Two ISA compliant model portfolios
- Full UK and US tax reporting

By becoming a client of LGT Vestra US your clients can rest assured in the knowledge that the investment decisions we make take into account the many tax implications and constraints that go part and parcel with their unique circumstances. Furthermore, our expertise in this area means that we can help implement investment strategies that are tax efficient to both US and UK tax systems. To assist your clients with their tax obligations we provide separate tax packs for the different tax years the two nations operate.

- We understand the similarities and differences between the two tax systems and structure portfolios accordingly.

- We understand that different investments hold a different appeal depending on a client's background, which is why we create investment strategies specifically tailored to their tastes.

- We share the same investment philosophy as our parent company, LGT Vestra LLP.

- We are hands-on when it comes to managing our portfolios. Our rigorous investment process means we do not invest in anything we do not believe in.

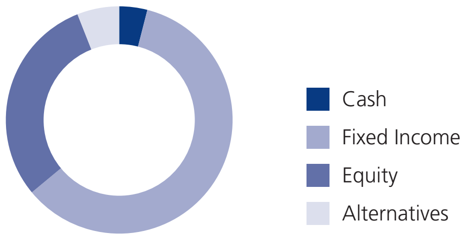
- Our team is dedicated to helping clients on both sides of the Atlantic, using a transparent fee structure, and focusing on achieving their individual investment goals.

Model Portfolio Service

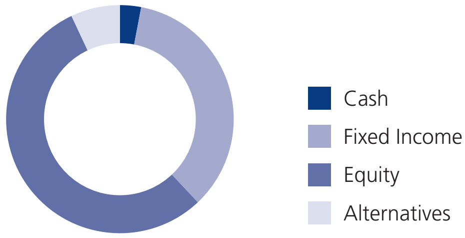
Our model portfolio service provides clients with a discretionary UK/US investment portfolio that takes into account the constraints and opportunities in both jurisdictions.

We have a range of model portfolios available in GBP and USD, ranging from very low risk to very high risk. Each one is actively managed to achieve its investment objectives.

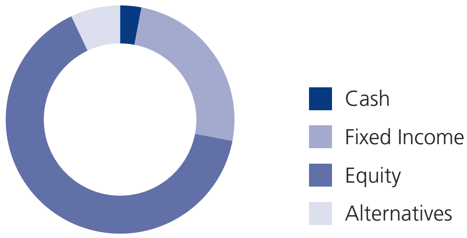
Low risk portfolio
Aims to preserve capital in real terms (i.e. to maintain the inflation adjusted value of assets invested.) This investment strategy may result in small fluctuations in the value of the portfolio but is not likely to hold investments which may fall substantially in value over the long term.



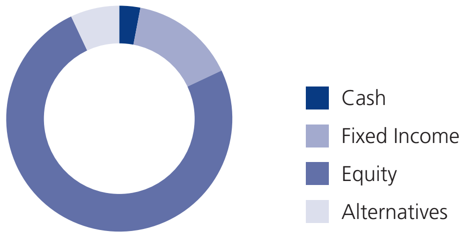
Medium risk portfolio
Aims to appreciate its capital value in excess of the rate of inflation but limit fluctuations in the value of the portfolio by investing in a diverse portfolio of assets.



High risk portfolio
Targets above-average returns and the approach may result in a high risk of fluctuations in the value of the portfolio and potential loss of capital.



Very high risk portfolio
Aims to aggressively target high returns by allowing concentrated exposure to a single asset class or individual assets.



For illustrative purposes only. The models are available in both USD and GBP and in addition to the models above we also manage specific ISA models in GBP.

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