An introduction to LGT Vestra for advisers

About us

LGT Vestra is a UK and Jersey-based wealth management partnership that was founded in 2008 to serve the needs of our clients, including intermediaries and the successful individuals they represent.

We're a privately owned business that's determined to bring some fresh thinking to wealth management, developing a discretionary model portfolio service that's client-focused, approachable and forward thinking.

We're here to work in partnership with advisers, providing them with the investment expertise that they may not have the time or resource to develop themselves, adding value to the intermediary-client relationship.

After a successful 8 years, we now have over £6.4 billion in funds under management and in June 2016 joined in a strategic partnership with LGT, the leading private banking and asset management group, wholly owned by the Princely family of Liechtenstein. The partnership will build on the strengths of both firms to provide your clients continuing excellence in investment portfolio management.

What makes us different?

- We have a specialist regionally based Business Development team that work purely with our IFA partners. We aim to provide you a personalised and individual level of service.
- We understand that your clients are YOUR clients and will always put their interests at the heart of our business.
- We are always transparent with our fees and the associated investment management costs so your clients know what they are paying for and why.
- We are privately owned which ensures a long-term outlook and financial security. We continually look for new ways to improve our service and proposition and always value your feedback.
- Our breadth of proposition and technical support allows you to develop new business opportunities with professional introducers and clients alike and adds depth to your own advisory proposition.

Our proposition and services

Fully bespoke discretionary management:

Multi-asset individually tailored portfolios designed specifically to meet the individual objectives of your client. We work closely with you as your client's adviser to understand their suitability requirements in terms of attitude to risk and capacity for loss, making sure that the portfolio is correctly positioned to provide the investment returns your client needs to meet their financial goals and objectives.

Ethical Portfolios:

As part of our wider bespoke proposition we are proud to be able to offer investment portfolios specifically designed to meet your client's ethical requirements. As part of this service we utilise an "Ethical Screening Service" which enables us to screen any potential investments that conflict with your clients chosen set of criteria.

Advisory Portfolios:

Our Advisory Portfolio management service is for clients who wish to be 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.

Model Portfolios:

We offer a suite of five "volatility" controlled model portfolios as well as a Strategic Income Portfolio which have been very successful in providing our strategic IFA partners with an effective "outsourced" investment solution for their clients. The model portfolios, launched in November 2009 have been specifically designed to be "custody neutral" and can be accessed through a range of leading third party platforms as well as via our own custody arrangements.

Bespoke Model Portfolios:

In addition to our "standard model portfolios" we have the capability to run "bespoke" model portfolios which are managed in a joint partnership specifically to the requirements of a particular IFA firm and their clients. Our research capability and discretionary powers can allow for a quicker and more efficient response to fast changing markets, and offer advisers and their clients a fresh and original investment experience.

Offshore Model Portfolios (Jersey):

We offer a suite of 18 model portfolios denominated in sterling, euro and US dollars. The offshore model portfolios are managed from and custodied in Jersey, but can also be custodied on a select range of external platforms. Like our onshore model portfolios, they are not linked to any specific market benchmark. This service is attractive for clients wanting their investments custodied outside of the UK and in a very cost effective manner.

LGT Vestra Offshore (Jersey):

LGT Vestra Jersey can also meet the requirements of your clients who have offshore assets and looking for bespoke investment management. These portfolios can be managed in London or Jersey. but custodied via our Jersey office and can be particularly attractive for Non-UK Domiciles, offshore trust and corporate structures as well as fiduciary companies, who have very specific investment requirements.

LGT Vestra US:

Planning for individuals who are US persons can be incredibly complex. By accessing the services of LGT Vestra US, we can provide for your US connected clients a range of model and bespoke portfolio solutions that are managed in strict accordance with US tax legislation and reporting requirements.

Technical Consultancy:

As part of our service to IFAs we provide technical support and CPD based seminars and workshops on a range of subjects including pensions, trusts and corporate and tax planning. We also work closely with advisors to help provide relevant CPD for their professional introducers. We can also assist with individual client scenarios and provide help and advice in giving your client the right financial planning outcome.

What value can a Business Development Director add to your business?

- Effective liaison between you and your clients and our Investment Managers and Model Portfolio Service team
- Understanding your client's requirements and help implementing the most appropriate investment solution
- High level administrative and compliance support
- Effective communication on investment markets, financial planning and tax updates
- Working with third parties such as external platform providers
- Support with your marketing initiatives and help building relationships with professional introducers

Your contact:

I am your key contact at LGT Vestra. My role is to make sure you and your clients receive the best service and support.

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Important information