London & Capital

AN INTRODUCTION TO THE US FAMILY OFFICE

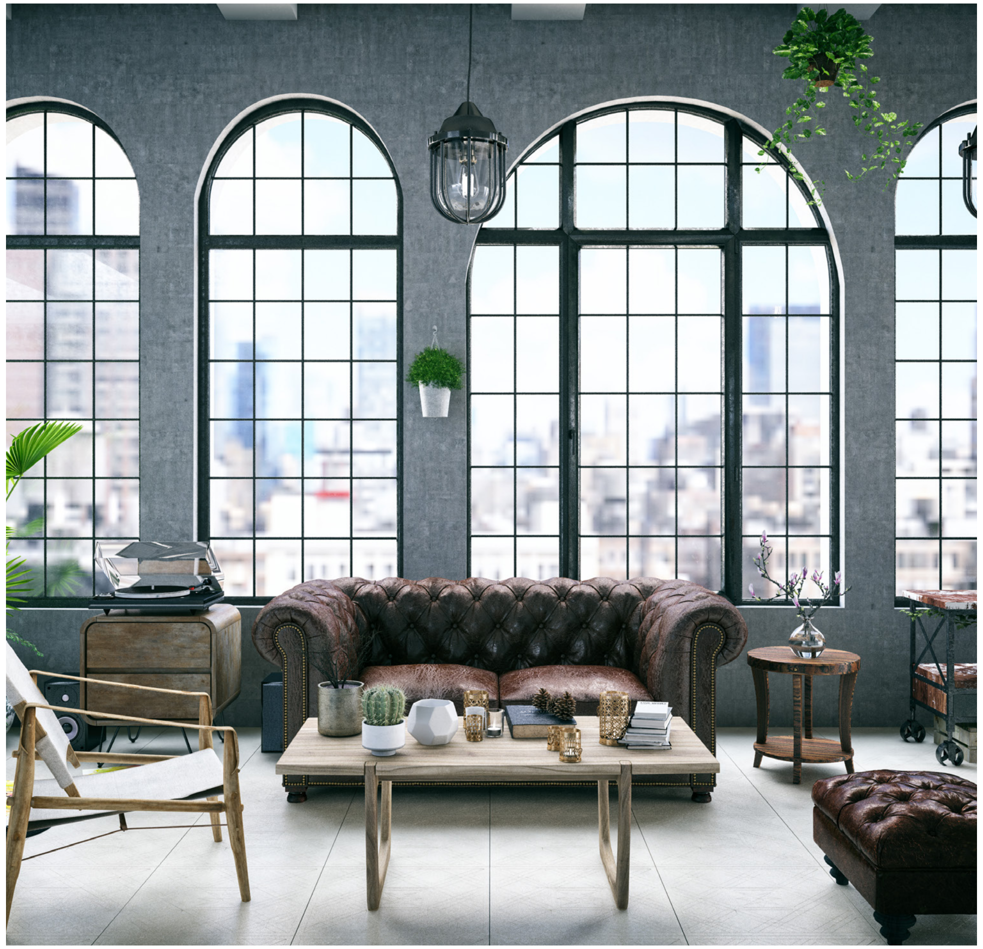
BY KRISTIN SCHAEFER & TOM SHERIDAN

In a world of ever-increasing complexity, we have clients who have been with us for over three decades because we offer something different.

Both wealthy families and institutions face the complex task of trying to navigate the demands of regulation and international taxation, whilst at the same time, ensuring their money is managed in line with their aims.

London & Capital has been built on the skills, expertise and experience necessary to deal with these challenges and make our clients' lives easier.

We specialise in helping clients organise their wealth into a coherent global strategy, invest with a focus on capital preservation and provide clear, concise global reporting.

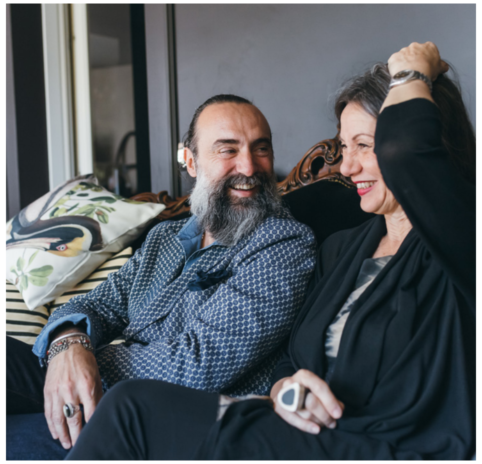


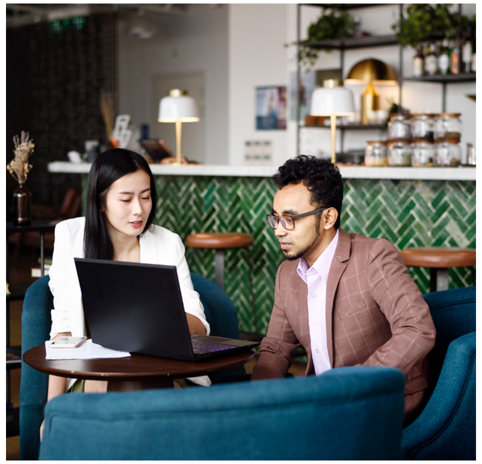
01 WELCOME

Our clients, whether individuals, families or institutions, generally share similar requirements; they have amassed wealth or capital and now need it to be structured and invested in a way that preserves and grows it for the future.

UK AND INTERNATIONAL
The core of our expertise is managing investments for wealthy families. We build investment strategies that are designed to be resilient and help clients achieve their long-term financial goals. Many of our clients are international, with finances, business interests, property and family across multiple countries. We provide clear comprehensive financial strategies and global reporting regardless of currency or location.

US CONNECTED
We are one of the few wealth managers who actively welcome US clients and are both SEC (US) and FCA (UK) regulated with a dedicated team looking after international American families since 1989. Whether you are a US Citizen or Green Card holder living abroad, a British expat in the US or a foreign entity with US reporting, we are uniquely positioned to assist with wealth planning, investment management and reporting across all global assets.





02

OUR CLIENTS

STRATEGIC FINANCIAL PLANNING

We organise and manage our clients' worldwide assets, delivering a coherent and global investment strategy.

OUR SERVICES

- US/UK/EU tax efficient financial planning
- US/UK/EU pension planning
- Using US foreign tax credits
- Tax planning opportunities
- Estate planning opportunities
- Access to credit facilities
- Philanthropy and grants

INVESTMENT STRATEGY

Our investments are structured to comply with US regulations, so that they do not attract highly disadvantageous tax implications.

OUR FOCUS

- US compliant investment strategies
- Multi-currency investing
- Multi-strategy and multi-asset class portfolios
- Focus on capital preservation

CONSOLIDATED REPORTING

Legislation such as Hire Act and Foreign Account Tax Compliance Act (FATCA) have significantly increased the reporting burden for US-linked citizens. We provide consolidated reporting across all our clients UK, US and offshore assets.

OUR REPORTING ABILITY

- US calendar year reporting
- UK fiscal year reporting
- Separation of short and long-term gains
- 1099, 3520, FBAR information
- £/$ FX gains and losses

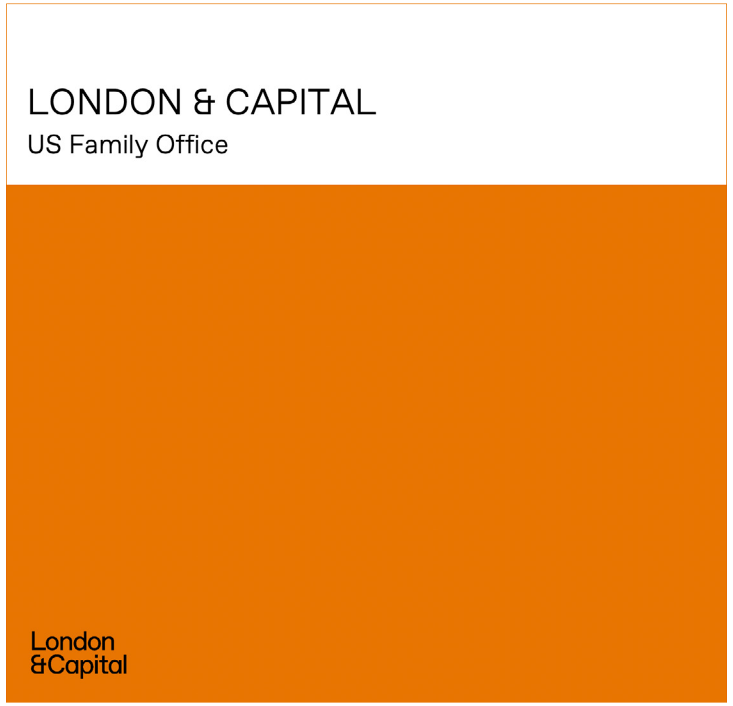
03

OUR OFFERING

THE CABLE

Resource for international American families.

CLICK TO VIEW



INTRODUCTION TO THE US FAMILY OFFICE

CLICK TO VIEW

US FAMILY OFFICE VIDEO

CLICK TO VIEW

PODCAST

A United Approach: a podcast for international Americans. Unprecedented insights into how you can navigate the complexities faced by US expats in the UK.

CLICK TO FIND OUT MORE

04 RESOURCES

05

THE CLIENT PORTAL

We want you to know and understand what we are doing on your behalf. As part of this, we provide access to an online portal where you can review your portfolios with London & Capital all in one place.

THE PORTAL PROVIDES:

- The ability to view a portfolio from different perspectives (current value, currencies, asset class and geographical weighting, performance etc.)
- An option to select the information received in a range of formats
- A document library with all portfolio information held in one place

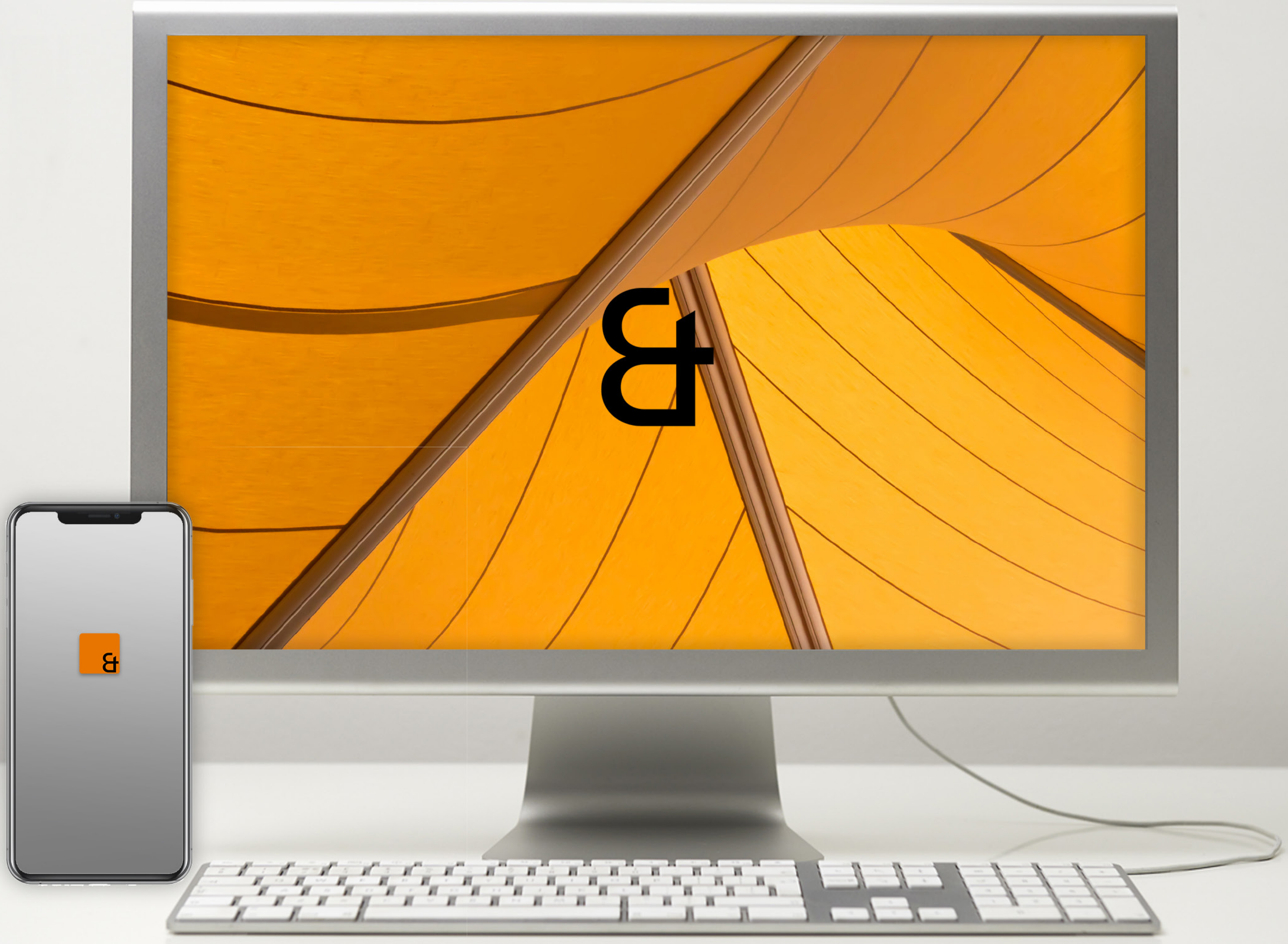
CLICK TO VIEW THE USER GUIDES

LOGGING IN

NAVIGATING YOUR HOME PAGE

REVIEWING YOUR INVESTMENTS

DOCUMENTS AND SETTINGS



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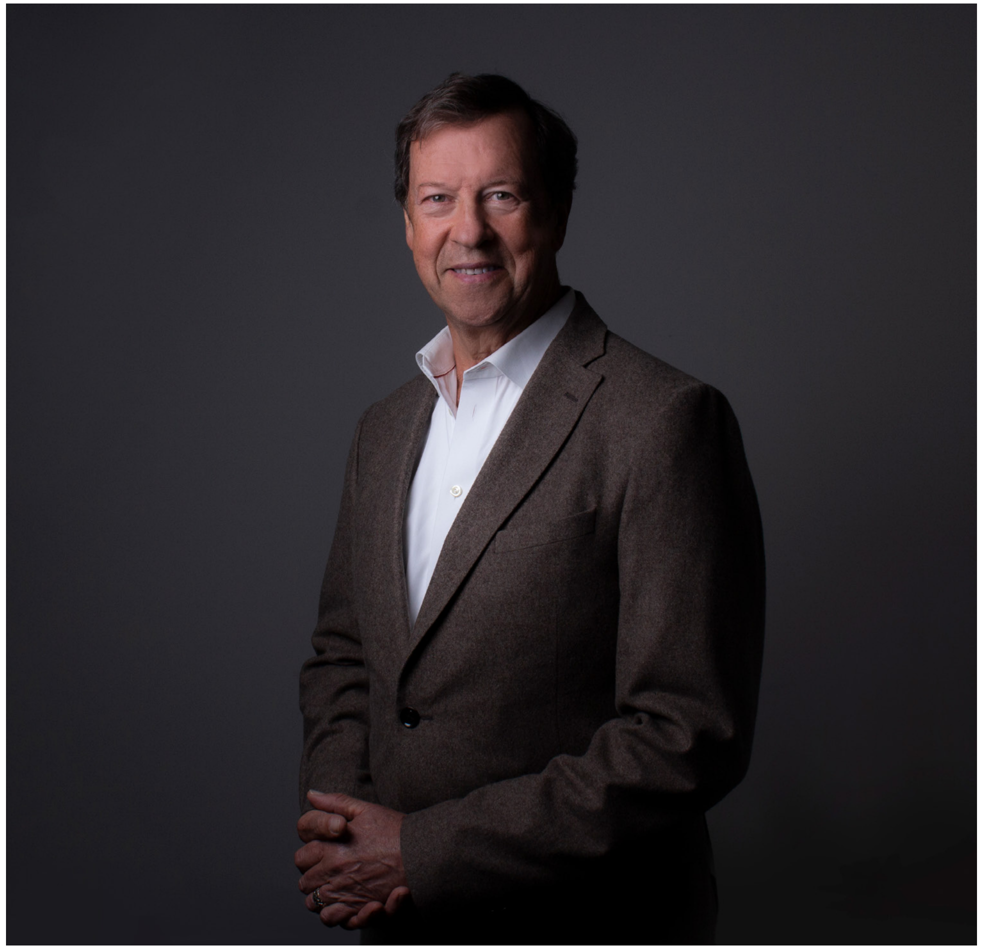

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CLICK TO READ BIO

CONTACTS

LONDON & CAPITAL GROUP

- Global wealth management company
- FCA / SEC regulated
- Assets under management of $8.0bn*
- 120 employees with offices in London, Barcelona and Barbados
- Global custodians including:
  ROYAL BANK OF CANADA
  - Domestic US

  MULTREES
  - UK
  - Luxemburg

  JULIUS BAER
  - Luxemburg
  - Guernsey
  - Zurich
- Award-winning capital preservation solutions and strategies

US FAMILY OFFICE

- Recognised as one of the leading wealth managers for US connected individuals and families
- Advising US clients since 1989
- 3 key services
  - Tax optimised wealth planning & structures
  - US compliant investment management
  - Multi-currency investment reporting
- We work in partnership with leading global lawyers and accountants
- US domestic and international custodians

*As at 30th September 2024

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