Private Banking | Wealth Planning | Investment Management

ARBUTHNOT LATHAM
Private Bankers
Since 1833

For business.
For family.
For life.

You expect the best. Especially when it comes to growing, protecting and passing on your wealth.

You want to know that you are understood: that all the unique aspects of your private and business life are connected, with every facet of your wealth working hard for you.

We provide an approach that adapts intuitively to change and challenge, openings and opportunities, to deliver a seamless Private Banking, Wealth Planning and Investment Management service.

This enables you to manage your shorter-term lifestyle requirements, whilst realising your longer-term business, family and personal financial goals – for where you are now, where you'd like to be tomorrow, and the legacy you wish to leave for future generations.

Your relationship with us begins with your dedicated Private Banker, who acts as an intermediary to connect you to all the expertise at Arbuthnot Latham.

Your Wealth Journey

Wealth is made of much more than money – it is realising hopes and dreams, passions and partnerships. At Arbuthnot Latham, we strive to see beyond the obvious to help you achieve what really matters.

You will receive a truly tailored and personal experience that adapts over time to support your wealth journey, wherever it may take you.

One of the oldest banks in the city, we first opened our doors in 1833 as a merchant bank. Building on our rich history of serving wealthy individuals and their families, we currently have offices in London, Exeter, Manchester and Dubai.

And, just like you, we value our independence.

The majority of our AIM-listed shares are in the hands of our long-standing Chairman. This independence of ownership means we can make our own decisions and follow our own financial instincts.

From day-to-day banking transactions to lifelong goals realised through our Wealth Planning and Investment Management experts, our strength lies in the lasting, intelligent and trusting partnership we build with you and your family.

Smart Relationships

Your relationship with us is built on trust and understanding, the personal chemistry between you and your Private Banker, and our ability to work expertly across all aspects of your financial life.

By being there for you, listening carefully, acting with your full agreement, keeping our promises and helping you to make smart decisions, we are committed to delivering one distinctive experience – a feeling that “no-one connects with me like Arbuthnot Latham.”

You will benefit from:

- A single, constant point of contact supported by a team of Investment Management and Wealth Planning experts.
- The sophistication to address your complex, multi-faceted wealth issues as they evolve over time.
- An innovative approach that embraces new and better ways of doing things, providing you with the best products, services and new thinking to enhance your position.
- Comprehensive financial expertise from a bank whose name dates back to 1833.
- The highest levels of integrity, exclusivity and service.
- Independent, unbiased and unrestricted Wealth Planning advice.
- Specialist teams offering specific intelligence and insight across a number of areas including international, media and entertainment, and executives.
- A fair, honest and transparent fee structure.
- An online banking facility and investor portal.
- A synchronised approach that accommodates your professional advisers.

Meeting Your Needs

As you grow your business, expand your family, think about succession or plan for retirement, your wealth needs will evolve. You need advice and wealth solutions that will adapt to meet those needs over time.

Having the right expertise at your side to minimise and manage risk, whilst realising your wealth's potential, requires a fluidity of approach. We offer a seamless service that connects you to best-in-class thinking.

From wealth structuring to financial planning, and property finance to fast-track borrowing facilities, our solutions suit every eventuality.

Private Banking

You will have access to a complete suite of Private Banking services created around your lifestyle and circumstances. We provide deposit facilities, credit, debit cards, worldwide money transmission, money market deposits in major currencies, and a wide range of treasury and foreign exchange services.

These are all handled by your dedicated Private Banker, who is responsible for all your dealings within the bank and oversees both your personal and business needs.

Investment Management

You'll benefit from access to an intensively managed portfolio, with a level of involvement tailored to your choosing.

Free from restrictions or affiliated products, your Investment Manager works to deliver optimal post-tax returns via myriad investment opportunities that can be personalised to meet your requirements.

Wealth Planning

Based on a clear understanding of your situation, and your immediate needs as well as your long-term goals, your Wealth Planner will work with you to develop and execute a bespoke wealth plan.

Your retirement, estate and succession planning, insurance and tax planning issues are all handled by the first UK Private Bank to be awarded the coveted Corporate Chartered status. This is a title of commitment to an overall standard of excellence and professionalism, awarded by the Chartered Insurance Institute.

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