ARBUTHNOT LATHAM
Private Bankers
Since 1833

Helping you plan for today, for tomorrow and for generations to come.

You recognise the importance of good advice. In today's complex financial world, this has never been more critical.

After working hard to understand your circumstances and what you want to achieve, we build and manage your financial planning strategy to support your wealth journey.

We understand what is required to provide you with the right advice, helping you to realise your objectives, maintain your lifestyle, and build and protect your wealth.

Whether you're planning for retirement, protecting your family's assets for the future, or working towards a smooth succession, we can help you determine which wealth planning strategies are right for you.

We provide advice on a restricted basis. This means we adopt a focused selection process allowing us to concentrate on identifying and reviewing the most suitable solutions for you. You will receive advice on tailored solutions delivered in-house and from a wide variety of providers across the global financial industry. As a boutique Private Bank we will only ever consider those products and services that we believe to be amongst the best in class and best suited to the advice we provide to you.

Connecting With You

You require a bank that can help you with the complex financial aspects of your life, with the understanding that your business and family finances are interlinked – not separate entities. We provide one point of contact that can provide all the expertise and guidance you need to use, grow, protect and pass on your wealth.

You can be safe in the knowledge that your family, financial interests, business activities and your lifestyle can be bound together and dealt with as one, allowing you the time to concentrate on your busy life.

Gone is the traditional patchwork approach that leads to overlapping policies, insurances and pensions that address issues in isolation. In its place is strategic, tax-efficient wealth planning that is built on an in-depth understanding of where you are and where you want to be in the future.

All this is managed and executed by your dedicated wealth planning professional, who has experience of advising wealthy individuals and their families.

Your wealth planning strategy is built for one purpose: to serve your best interests – whatever they may be.

Realise Your Wealth's Potential

Whether you are welcoming a new addition to your family or retiring from a successful career, your wealth will need to serve you differently at various stages of your life.

You may need some flexibility with your finances in the short-term – that's fine. Adapting, refining and protecting your plan from unforeseen circumstances defines our approach to wealth planning.

Longer-term objectives are achieved by ensuring you have the right financial foundations in place to meet all of your future requirements.

You will benefit from:

- A wealth plan tailored to your specific life goals, with the flexibility to adapt in the shorter-term, but built with your longer-term ambitions in mind.
- A wealth planning process that has been built to an internationally-recognised standard.
- Access to tax-efficient planning that ensures you receive optimal returns from all aspects of your plan.
- A fair, honest and transparent fee structure.
- An inclusive service that works seamlessly with your other professional advisers.
- Regular contact and communication with you – ensuring your plan remains on track to achieve your financial aims.
- Access to research from top global institutions and specialist boutiques, to expert economic or market commentators.
- Having your affairs managed by the first UK Private Bank to be awarded the coveted Corporate Chartered status – a title of commitment to an overall standard of excellence and professionalism, awarded by the Chartered Insurance Institute.

Supporting Your Wealth Journey

The road to significant, lasting wealth can often be accompanied by challenges and great responsibility. As your life develops, the layers of complexity increase for both you and your family.

Guiding you through those complexities requires advice built on a deep understanding of your situation. We explore your attitudes, philosophies and the personal issues you face, to help you realise your ambitions and dreams, passions and partnerships.

A summary of areas we explore with you is listed below.

Lifestyle

Mapping your lifestyle requirements helps to set the scene for the rest of your financial needs, from moving house to establishing a charitable trust.

Budgeting

Analysing income and expenditure is an effective way to ascertain how you use money, and paints a broad picture of your attitude to finances.

Liquidity

Liquidity provides you with readily-accessible funds for unplanned expenditure.

Protection

Protection and peace of mind for you and your family, and a shield for times of potential hardship.

Borrowing

High or low risk borrowing that can be arranged around your needs and appetite.

Retirement

Accumulating adequate assets to provide a standard of living in keeping with your expectations.

Tax Planning

Helping you to fully address the challenges and realise the opportunities of your tax situation.

Investment

Careful analysis ensures your investments are functioning as efficiently as possible, while remaining suitable for your needs.

Estate Planning

Helping you to navigate the complexities of taxation and legislative requirements with a clear implementation strategy.

Contact Information

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