

## Serving Entrepreneurs

**As an entrepreneur**, you have devoted your time and energy to building a successful business. Now you are considering the next stage of your journey. Allow us to design a strategy for your wealth, to plan for today and invest for tomorrow. For yourself and for your family.



What do I need to think about **before I sell my business?**

What is my **tax situation?**

How can I preserve and grow my wealth **after a business sale?**

How can I prepare **to pass my wealth** and/or business on to my family?

Your wealth comprises many different baskets of assets.

The amount held in these different baskets will fluctuate over time, and at different stages of your life.

We can help you think clearly about your wealth and identify strategies to manage it efficiently.

<p><b>Your company</b></p>	<p><b>Lifestyle assets</b></p> <p>Personal real estate Art, cars, yachts Personal income needs</p>	<p><b>Liquid assets</b></p> <p>Cash Money market funds Short-term fixed income</p>	<p><b>Growth and capital preservation</b></p> <p>Diversified investment portfolios Private equity Real estate</p>	<p><b>Wealth transfer strategies</b></p> <p>Philanthropy Inheritance / Legacy</p>
<p><b>Liaising with advisers</b></p>	<p><b>Cash management, financing</b></p>	<p><b>Managing, advising and execution</b></p>	<p><b>Sourcing and managing investments</b></p>	<p><b>Wealth structuring</b></p>

Investment management that generates value.  
A personal, flexible and transparent relationship.

**Our mission is to preserve and grow the assets entrusted to us.** Your banker will take the time to listen to you and understand your personal circumstances. He or she will determine and implement the appropriate asset allocation to help you and your family finance your ambitions and maintain your standard of living in the short, medium and long term.



Active listening, with the ability to step back and take an holistic view

We are entrepreneurial bankers. This means we understand your needs. We ask you about your way of doing things, so we can help you reach your goals.



Personalised, coordinated and comprehensive approach to your wealth

In-depth wealth diagnostic. Analysis of your personal and professional circumstances and targets. Optimal asset structuring (corporate, liquid and lifestyle assets, portfolio investments, savings, wealth transfer strategies).



Tailored and transparent portfolio management strategy

Construction and management based on our experts' global views on all asset classes. Transparency with regard to strategy, allocation and costs.



Consideration of tax aspects

Establishment of tax-efficient management to mitigate capital erosion risks.



Advanced technology platform for management, reporting and consolidation

A global, consolidated view of all of your financial assets. Customisable analysis and reporting, access to market data, Lombard Odier research and publications.



Local expertise

Established expertise in serving UK domestic and UK resident non-domiciled entrepreneurs from London, Geneva and Zurich. Network of external advisors.



Sustainability integration

Deep integration of sustainability into the way we run our business and invest on our clients' behalf.

## Our Global UK Business

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