Rothschild & Co
Wealth Management

Rothschild & Co Wealth Management UK

We help clients formulate their overall wealth strategy, advise on long-term investments and ensure a secure home for their assets

Who we are

- We are part of the Rothschild & Co group, founded over 200 years ago and still majority owned by the Rothschild family. Alexandre de Rothschild is our Executive Chairman and is a seventh-generation member of the family.
- Our family ownership allows us to take a long-term perspective that sets us apart, both in the way we invest for our clients and in the way we invest in our clients and relationships.
- We are focused on doing one thing well – preserving and growing our clients' wealth in real terms.

How we help our clients

- Our focus is on discretionary portfolio management, meaning that we build globally-diversified portfolios that preserve and grow the value of our clients' wealth using a combination of return and diversifying assets:

RETURN ASSETS

Direct equities and funds that we expect to drive long-term performance. Our concentrated holdings typically have high returns on capital, strong competitive advantages and great management teams

DIVERSIFYING ASSETS

Assets that we expect to provide protection in challenging equity markets and an alternative source of return and liquidity during downturns

- We are very experienced in working with successful individuals and families with complex structures, tax considerations and income requirements, priding ourselves on our exceptional levels of client service.
- Many of our clients find that working with us to build their personal wealth framework helps them to think about their long-term wealth objectives in 'pots':

LIFESTYLE	CASH	NEST EGG	GROWTH	BUSINESS
Family and holiday homes, personal collections with emotional returns	Day-to-day spending, deposits, liquidity funds with no inflation protection	Long-term globally-diversified portfolio that preserves wealth	Private equity, venture capital, commercial real estate with potential growth	Core business investments with potential lifetime growth or large sale proceeds

Rothschild & Co Wealth Management focus

Rothschild & Co advises clients across this framework

Our clients

- We advise across all the stages of the wealth journey, working with some of the world's most successful entrepreneurs, families and charities to preserve and grow their wealth.
- As our business continues to grow, our breadth of experience means that we are able to offer advice and tailored services to a broader client base. This new area focuses on high-earning and C-suite professionals, as well as pre- and post-exit entrepreneurs.
- Our client portfolios range from £2m to £500m.

Find out more

Please visit our website where you can find more information about the services we offer at Rothschild & Co Wealth Management, as well as contact details for our Client Advisers.

www.rothschildandco.com/wealthmanagementuk