



ST. JAMES'S PLACE WEALTH MANAGEMENT

KEY FACTS

- FTSE 100 Company managing over £129.3 billion clients' funds under management, equivalent to approximately A\$231.8 billion (as at 31 December 2020)
- Managing in excess of 760,000 clients
- **Summary of services**
Tax efficient Investments | Retirement Planning | Education Planning | Discretionary Fund Management
Protecting Wealth | Life Cover | Health Insurance | Tax Planning | Succession Planning
- We maintain long-term relationships with clients, substantiated by 96.4% retention rates
- Transparent, portable, cost effective, flexible and non-contractual products
- **Distinctive approach to investment management** – At St. James's Place we recognise that no single investment house has a monopoly on investment expertise. Hence, we provide access to a carefully selected group of external fund managers of outstanding ability. The external fund managers are selected and monitored by the St. James's Place Asia Investment Committee on behalf of our clients. The Investment Committee is, in turn supported by a variety of independent external agencies.
- St. James's Place guarantees the suitability of the advice given by members of the St. James's Place Partnership when recommending any of the wealth management products and services available from companies in the Group
- 93% of clients would recommend St. James's Place to others and 96% of clients described our proposition "reasonable", "good" or "excellent" in terms of value for money [Source: Wealth Account Survey 2019, out of 38,696 responses]
- The St. James's Place Charitable Foundation has raised in excess of £100 million since inception, equivalent to approximately A\$180.4 million



The St. James's Place approach to investment management only applies to St. James's Place products.

The value of an investment with St. James's Place will be directly linked to the performance of the funds selected and may fall as well as rise. You may get back less than the amount invested.

The levels and bases of taxation and reliefs from taxation can change at any time. The value of any tax relief depends on individual circumstances. You are advised to seek independent tax advice from suitably qualified professionals before making any decision as to the tax implications of any investment.

St. James's Place Wealth Management

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Please note that due to local legislation we are unable to offer our financial planning services to nationals of the People's Republic of China. St. James's Place Wealth Management Group Ltd Registered Office: St. James's Place House, 1 Tetbury Road, Cirencester, Gloucestershire, GL7 1FP, United Kingdom. Registered in England Number 02627518.