

# WEALTH PLANNING

TOGETHER LET'S TAKE CARE OF YOUR FUTURE



**Wealth is always unique and reflects a history. Managing it for future generations is an essential objective that we value.**

We take the time to find out about your personal, family and professional situation so that our wealth planners can define an overall strategy with you. Based on this analysis, we offer tailor-made solutions approved by your legal and tax advisers.

At each key moment of your life, our experts are there to adapt your wealth planning strategy.

## **Our offering<sup>(1)(2)</sup>**

- An integrated approach  
Wealth planning strategy, fiduciary services and life insurance
- A wide range of products  
Succession planning tools and wealth holding structures, dedicated and family funds

<sup>1</sup> Wealth solutions and/or services mentioned in this document may not be available in certain Societe Generale Private Banking entities. They depend on local legislation and regulations. Furthermore, according to the legislation and legal and tax regulations applicable, these solutions and services may not be adapted or authorised in certain countries, or might be reserved for certain well-informed investors and competent clients, according to their investor profile and must conform to Societe Generale group's tax code of conduct.

<sup>2</sup> The legal, tax and financial information that your advisers give you will enable you to understand all the related risks and consequences.

Kleinwort Hambros does not provide tax advice. The level of taxation depends on individual circumstances and such levels and bases of taxation can change. You should seek professional advice in order to understand any applicable tax consequences.

## THE BENEFITS WE OFFER

A network of **240** experts

A presence in **9** countries

The capacity to deal with your requests

International expertise

## BEST WEALTH PLANNING TEAM



## OUTSTANDING WEALTH PLANNING AND TRUST PROVIDER



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