MASECO

An Overview

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Company History

MASECO Private Wealth was founded in 2008 in the wake of the intrduction of the non-domicile tax rules in the UK. The Partners had previously developed the US/UK private client desk within a large Private Bank in London.

As a result of the changing landscape of global wealth management a different approach would be required to service the needs of international families. The alternative structure needed to remain not only tax-efficient and cost effective for American individuals living in the UK but would also need to be built upon global best practices. Some 11 years later MASECO oversees approximately $1.7 billion in assets across approximately 650 families.

Our Values

MASECO has a core set of values that form the foundation of everything we do. This translates into behaviour that is consistently applied and communicated both internally among our employees and externally among our clients. We strive to provide a Phenomenal Client Experience and seek to work with individuals and intermediaries who understand and appreciate our DNA.

We believe that as an organisation we have multiple responsibilities. We have responsibilities to our clients, our employees, our suppliers and to the world around us. MASECO strives to ensure that decisions are made with these responsibilities in mind. As such we were one of the first wealth management firms in the UK to achieve B Corporation status. The certification confirms and emphasises our commitment to look beyond the traditional model of capitalism when making decisions that affect others.

What We Do

MASECO develops and implements global, tax-efficient wealth strategies for families, trusts and foundations based in the UK and USA. Our aim is to deliver expert advice, designed to simplify and tackle the complexities associated with cross-border wealth management.

We deliver comprehensive wealth management and investment advice to clients based on trust and open communication. Our mission is to guide families with cross-border economic interests to a meaningful financial future. MASECO's Wealth Management equation provides a framework for the delivery of a systematic wealth management offering:

Wealth Management =
Investment Management + Wealth Planning + Relationship Management

Investment Management

MASECO believes that investment decisions should be guided by the wealth of academic and empirical evidence available to us. We believe the first question every investor should ask is: Where do returns come from? The MASECO investment philosophy is based upon investment principles academically proven in research, which we draw on to construct and manage robust portfolios that are structured to capture returns in an efficient and cost effective manner. In doing this we strive to deliver a personal and meaningful investment experience to our clients. We define a meaningful experience as one where our clients have a clear understanding of how their wealth will be used to meet their future lifestyle goals, and are engaged in their investment journey.

Our approach to investing is elegantly simple, yet highly effective. We follow a quantitative 'smart beta' approach that seeks to capture known risk premia to enhance risk adjusted returns. MASECO seeks to optimise its global investment strategies from a tax, currency and cost perspective through custody arrangements with the most reputable firms across various jurisdictions, including the US, UK and offshore locations. We can help you to achieve the returns delivered by the markets, by minimising both financial and emotional costs, and helping you to stay the course. Belief, patience and discipline are the key to a successful investment experience.

Costs matter

Market anomalies exist

Portfolio structure dominates risk and return outcomes

Good risk management only starts with diversification

Good investing is rational and long term

Tax efficiency increases net returns

Accepting some illiquidity can have benefits

Advanced Planning

Wealth Planning is our approach to building a comprehensive financial strategy that addresses your personal values, goals and vision. We help you to develop bespoke wealth structuring solutions that are designed to meet your specific goals. Wealth Planning can be broken down into the following four components:

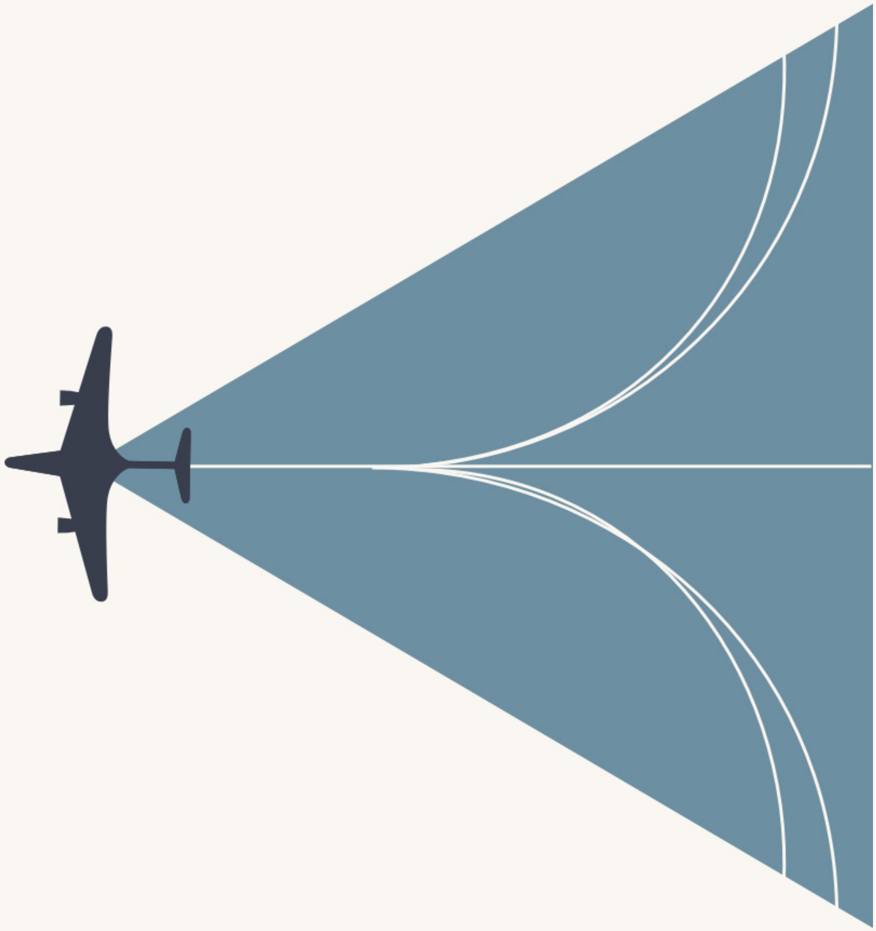
Wealth Enhancement
Tax, cash flow and retirement planning

Wealth Transfer
The effective transfer of wealth to others

Wealth Protection
Risk mitigation through use of relevant insurance and legal structures

Charitable Giving
Meeting charitable intentions in the most effective and efficient fashion

Your success represents a collection of everyday financial decisions that will impact your bigger picture. We help to ensure that you make robust, sensible and logical decisions that as a result will maximise the chances of successfully meeting your broader life goals.



Relationship Management

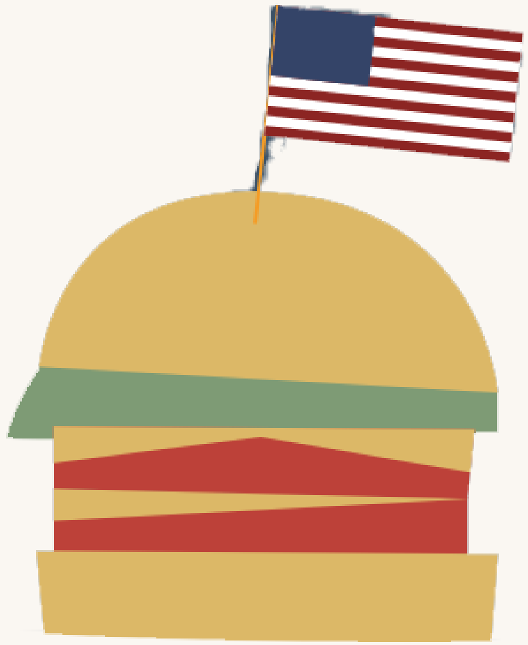
MASECO believes that a comprehensive wealth management service goes beyond simply Investment Management and Wealth Planning. Our highly experienced advisers remain dedicated to being a proactive partner with you on your lifelong investment journey. A reliable and personalised partnership affords you the ability to focus on what is most important: living your life the way that is most fulfilling for you as an individual.

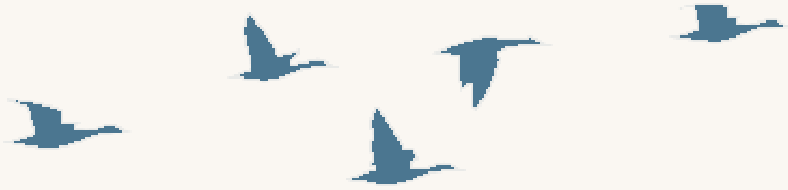
You receive advice carefully tailored around your needs and circumstances. MASECO taps into its extensive network of lawyers, accountants and other professionals to build integrated expert teams around you to deliver a seamless family office style service.

Our Service

Our service offering is focused on individuals with at least $1 million or more in investable assets and who may have financial needs that span multiple jurisdictions. Our clients can invest either on a Discretionary or Intermediated basis and benefit from partnering with us to provide ongoing wealth management advice. We work closely with you to develop a deep understanding of your wealth goals, individual personal circumstances, risk parameters, investment knowledge and experience, and your investment time horizons across the various accounts. We will structure and invest your wealth in a way that aims to meet your goals in the most tax-efficient and cost effective way possible.

As a client of our service you pay an ongoing fee based on assets under management that not only delivers our investment expertise through the investment management of your portfolio but also secures the benefit of our Wealth Planning services to ensure that you always maintain a cohesive strategy with respect to your financial lives. Our ongoing relationship management helps provide you with peace of mind and continued financial support as you navigate life's inevitable challenges and encounter varying tax rules and legislative changes.





More about our service

Discovery – An altogether different approach, right from the start
From day one, you'll see that working with MASECO is different. With most 'Wealth Managers,' the discovery process often begins and ends with numbers. But at MASECO, our first priority is to listen to you and your family. We take the time to understand your unique situation — your opportunities, your challenges and your hopes and dreams for the future.

The value we bring to our clients goes well beyond choosing and managing the right investments. We look into every aspect of your financial picture through the unique US and UK tax lens – from trusts to insurance, from estates to tax liabilities and more. We study all forms of risk in your portfolio – those risks that go-beyond traditional risks such as global tax and currency risk – and then help you discover more ways to make the most of your money and your life.

Wealth Analysis, from understanding to action
Once we know where you stand, where you want to go, we get to work. We use our expertise and experience of advising US and global families coupled with decades of peer-reviewed investment research to the test, crafting specific recommendations to help you find the best way forward.

Every financial choice impacts the bigger picture; we work alongside you to help you make sensible, robust and logical long-term decisions.

Investment Implementation – A belief in the bigger picture not the next big thing
With your plan in place your MASECO team puts it into practice. We believe investment decisions should be guided by academic research and robust evidence. As such our Investment Committee continuously studies, evaluates and applies the latest peer reviewed financial research to ensure that your portfolio lives up to our exacting standards and philosophy.

Relationship Management – Starting with a promise to do what is right for you
At MASECO, doing what is right for our clients means assembling a passionate team with common values and high emotional intelligence that lives and breathes the science of investing and the intricacies of US/UK wealth planning. A team that combines years of experience and exposure to economic ups and downs with today's technology to optimize our ability to achieve your most important goals.

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Find Out More

If you feel you could benefit from MASECO's experience and expertise, we would be delighted to hear from you. Please contact us to discuss our offering in more detail.

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The value of your investments can go down as well as up, so you could get back less than you invested.

MASECO LLP (trading as MASECO Private Wealth and MASECO Institutional) is registered in England and Wales as a limited liability partnership (Companies House No. OC337650) and has its registered office at Burleigh House, 357 Strand, London WC2R OHS.

MASECO LLP is authorised and regulated by the Financial Conduct Authority for the conduct of investment business in the UK and is registered with the US Securities and Exchange Commission as a Registered Investment Adviser.'

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