Why choose MASECO

We are MASECO...

...an independent wealth management firm seeking to enrich the lives of our American and global clients through simplifying their multi-jurisdictional wealth management needs.

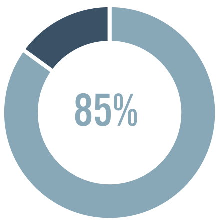
2008 FOUNDED PARTNERSHIP

$2.6bn ASSETS UNDER MANAGEMENT

21 AWARDS

82 PEOPLE

Our History



The majority of our clients pay US taxes so our core focus is building portfolios with this client group in mind

US-UK knowledge and experience is at the core of our business

Our regulatory awareness and memberships allow us to service US clients

Our global network of product providers, professionals and tax efficient investments help clients

2008
Team America: Josh and James, the heads of the US desk at Citi Smith Barney leave to found MASECO Private Wealth

2011
Industry recognition: MASECO wins a PAM award for product and service innovation

2015
Big milestone: MASECO surpasses $1bn under management

2016
Thought leadership: James Sellon wins Spear's High Net Worth Asset Manager of the Year

2018
Industry recognition: Andrea Solana, Head of Advanced Planning, wins Woman of the Year in Women in Financial Advice Awards

2019
Industry recognition: Josh Matthews wins Spear's High Net Worth Asset Manager of the Year

2022
Another milestone: MASECO manages $2.6bn assets under management

Industry Recognition

2021
MASECO shortlisted to Finalist of the Professional Adviser Awards as Tax-Efficient Adviser Firm of the Year and MASECO wins bronze in the Financial Advisory Firm of the Year category at the Magic Circle Awards.

2020
Josh Matthews, Co-Founder & Managing Partner, wins Gold as Private Banker of the Year.

2019
Josh Matthews, Co-Founder & Managing Partner, wins Spear's UK High-Net-Worth Asset Manager of the Year.

2018
Andrea Solana, Partner & Head of Advanced Planning, wins Woman of the Year in the Professional Advisers' Women in Financial Advice Awards in the in-house advisor support category.

2016
James Sellon, Co-Founder & Managing Partner, wins Spear's UK High-Net-Worth Asset Manager of the Year.

2015
James Sellon, Co-Founder & Managing Partner, named as one of PAM's 50 Most Influential Individuals in Private Wealth.

2011
MASECO wins PAM Innovation of Product or Service Award in recognition of our innovation in developing a service for US citizens living in the United Kingdom.

Executive Summary

MASECO provides expert wealth planning and investment management to globally minded families, individuals and "non-doms". We focus on Americans in the UK, trusts, foundations, corporations and UK citizens living in the US. We support their cross-border wealth management needs, advising clients directly and working alongside other trusted advisers.

Investing with MASECO

Our partners and wealth managers devise strategies customised to your specific needs. We invest globally and arrange for the custody of client assets with reputable firms across various jurisdictions, including the US, UK and Switzerland, to optimize portfolios from a tax, currency, cost and investment perspective.

MASECO is a limited liability partnership with a senior management team comprised of 9 members, biographies of whom can be found on the "Meet The Team" page of our website.

Where does MASECO fit?

MASECO has a rational approach to investing, focused on targeting long term, consistent risk adjusted returns designed to support our clients' lifestyles.

We structure your assets to target personal return expectations. We will help you navigate the complex multi-jurisdictional tax aspect of being a dual citizen.*

MASECO is the thought leader in US UK wealth planning. Our clients benefit from over 20 years of practical experience in creating wealth structures and strategies for US connected families.

Our Chief Investment Officer is an industry leading expert in Smart Beta investing. This expertise allows us to allocate capital in a strategic and rigorous manner.

*MASECO LLP is not a tax adviser and we recommend clients consult their professional tax adviser regarding the tax consequences of any investment strategy.

39 Steps
to Smart Living in the UK

Request our printed guide for US citizens living in the UK

THE COMPLETE FINANCIAL VIRGIL FOR EXPATS

A GUIDE FOR NEWBIES, OLD-TIMERS & THE CURIOUS

Why invest with MASECO?

Innovative Strategies

We seek diversification of assets that help to create 'all weather portfolios' for our clients

Globally Diversified

We believe a globally minded approach will allow us to capture returns, wherever they may appear.

Knowledge & experience

We have unrivalled experience and award-winning capabilities in the field of factor based portfolio construction and management for US/UK taxpayers.

Cost Effective, Tax Efficient

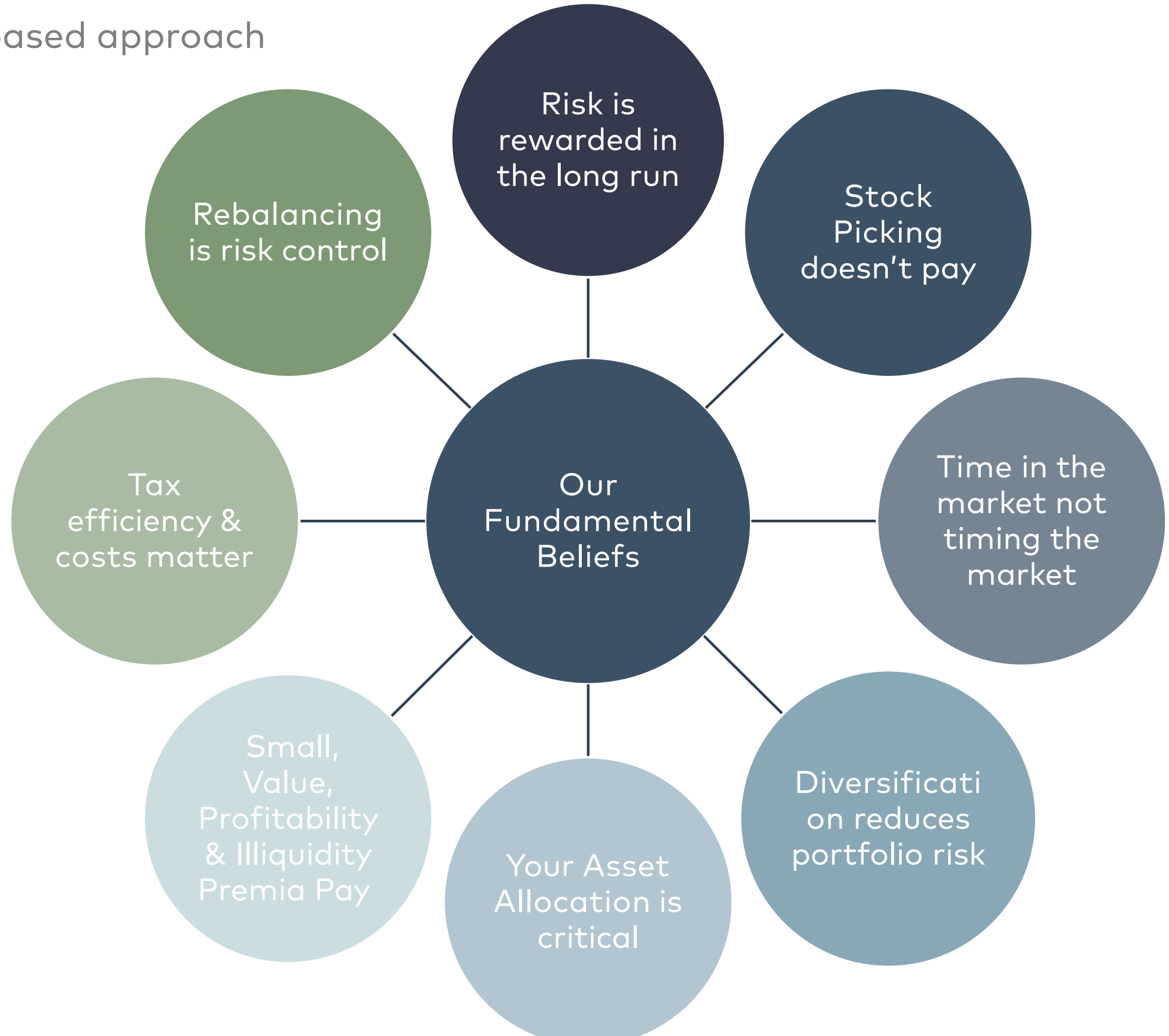
We have years of experience managing the costs and taxes that are incurred through investing, taking great care to protect your assets.

Risk Savvy

We understand how to seek the optimal returns per unit of risk for our clients through an academically proven framework.

Our Beliefs

An evidence-based approach



Wealth Management Consultative Process

Discovery Meeting
Complete discovery process

Wealth Analysis Meeting
Presentation of Investment Philosophy, review Rational Wealth Profile

Wealth Planning Meeting
Wealth structuring to build strategic wealth plan

Mutual Commitment Meeting
Presentation of Investment Policy Statement, insurance, confirmation of commitment & account paperwork

Induction Meeting
Meet the team, review account set up

Investment/Wealth Planning Progress Meetings
Review of progress and implementation of wealth plan – identify any new planning needs

Investment Philosophy
Detailed discussion on our approach towards investing and portfolio construction

Investment Plan
Diagnostic of current situation, our recommendations for moving forward (Cash Flow Planning, Risk Profile, Required Rate of Return)

The Wealth Management Plan
Comprehensive evaluation of the entire range of wealth management needs

Expert Network
Where appropriate, MASECO will tap into its extensive network of lawyers, accountants and other professionals to build integrated solutions

Social Responsibility

We are proud to be the first financial services B Corp in the UK. The B Corp accreditation ensures that companies do not just aspire to "do good" whilst simply doing well. B Corps operate under the basic tenet that companies can reflect the values of their stakeholders and be a force for positive change in the world.

Our Values

Teamwork

We are committed to working together and to supporting each other. Every person here is a valued member of MASECO and contributes to our success.

Authenticity

We are committed to being ourselves, to being open and honest and to standing up for what we believe in. Mistakes happen, and it is how we learn from them and grow from them that is more important than the mistake.

Mastery

We are committed to being masters of our subject, having knowledge and experience of the highest standard so that we can deliver service at the optimal level. We maintain a willingness to learn, to further ourselves and to better ourselves always.

Empathy

We are committed to treating others as we would like to be treated, putting ourselves in someone else's shoes and treating our co-workers, clients and anyone we encounter, with respect.

Pursuit of Excellence

We are committed to constantly be improving, always striving for more, and setting ambitious goals and doing everything we can to achieve them.

Important Information

This document is intended for the recipient only. It may not be copied, forwarded or otherwise distributed, in whole or in part, to any other party. The source of all data is Internal and as at 30 June 2020, unless otherwise specified.

Use of information:

- Nothing in this document constitutes investment, tax or any other type of advice and should not be construed as such.
- This document is provided for information purposes only; is not intended to be relied upon as a forecast, research or investment advice; and does not constitute a recommendation, offer or solicitation to buy or sell any products or to adopt an investment strategy.
- The views expressed herein do not necessarily reflect the views of MASECO as a whole or any part thereof.

Risk Warnings:

- All investments involve risk and may lose value. The value of your investment can go down depending upon market conditions and you may not get back the original amount invested.
- Your capital is always at risk.
- Although the information is based on data which MASECO considers reliable, MASECO gives no assurance or guarantee that the information is accurate, current or complete and it should not be relied upon as such.
- Certain products which may be used within a portfolio in order to give exposure to particular investment strategies may not be regulated in the UK and therefore will not have the benefit of the protections afforded by the UK regulatory regime.

MASECO LLP (trading as MASECO Private Wealth and MASECO Institutional) is established as a limited liability partnership in England and Wales (Companies House No. OC337650) and has its registered office at Burleigh House, 357 Strand, London WC2R 0HS.

MASECO LLP is authorised and regulated by the Financial Conduct Authority for the conduct of investment business in the UK and is an SEC Registered Investment Advisor in the US.

The individual partners are Mr J E Matthews, Mr J R D Sellon, Mr A Benson, Mr D R B Dorman, Mr H Q A Findlater, Mr T Flonaes, Mr E A Howison, Ms A L Solana and Mr N B Tissot. For your protection, telephone calls are usually recorded.