MASECO

Doing well by doing good.

Realising the benefits of a more sustainable business model and services.

Sustainability isn't a trade-off or compromise for growth; it's a powerful driver of commercial value. We're moving beyond simply doing "less harm" and instead exploring the opportunities that come with building a sustainable business.

Josh Matthews
Co-Founder

Our environmental commitment is a core tenet of the products and services we offer our clients. Our Low Carbon Centric (LCC) portfolios are a testament to this, allowing us to align our clients' financial goals with a more sustainable future.

James Sellon
Co-Founder

Recognising the strategic importance of sustainability

At MASECO, we operate on the guiding principle that the future of wealth management is intrinsically linked to a sustainable future for all. We believe in sustainability's potential to be a powerful driver of innovation, growth, resilience, and competitive advantage.

Our four pillars – **Thriving Clients**, **Protected Planet**, **Resilient Communities**, and **Fact-Based Futures** – form the foundation of this commitment.

We empower our clients to build a lasting legacy by aligning their impact ambitions with their financial future through our proprietary Best of All Worlds™ approach.

Simultaneously, we are dedicated to minimising our environmental footprint, actively supporting our communities, and upholding the highest standards of governance.

This holistic framework ensures that every decision we make is values-driven, research-based, and focused on creating long-term value for our clients, our communities, and our planet.

A principled, purpose-led approach.

Our operating model unlocks the opportunity for a more sustainable future.

We're reframing sustainability as a driver of innovation, growth, resilience and competitive advantage

Thriving Clients

Our proprietary Best of All Worlds™ approach aligns client values, ambitions and aspirations with their family's financial future. From green philanthropy to Low Carbon Centric portfolios, our holistic approach advances their near and long-term aims.

Protected Planet

Our focus lies on minimising our environmental footprint, conserving resources, and promoting ecological health. Where relevant, our action is judged by its impact on the natural world. We take purpose-led, values-driven decisions based on this ethos.

Resilient Communities

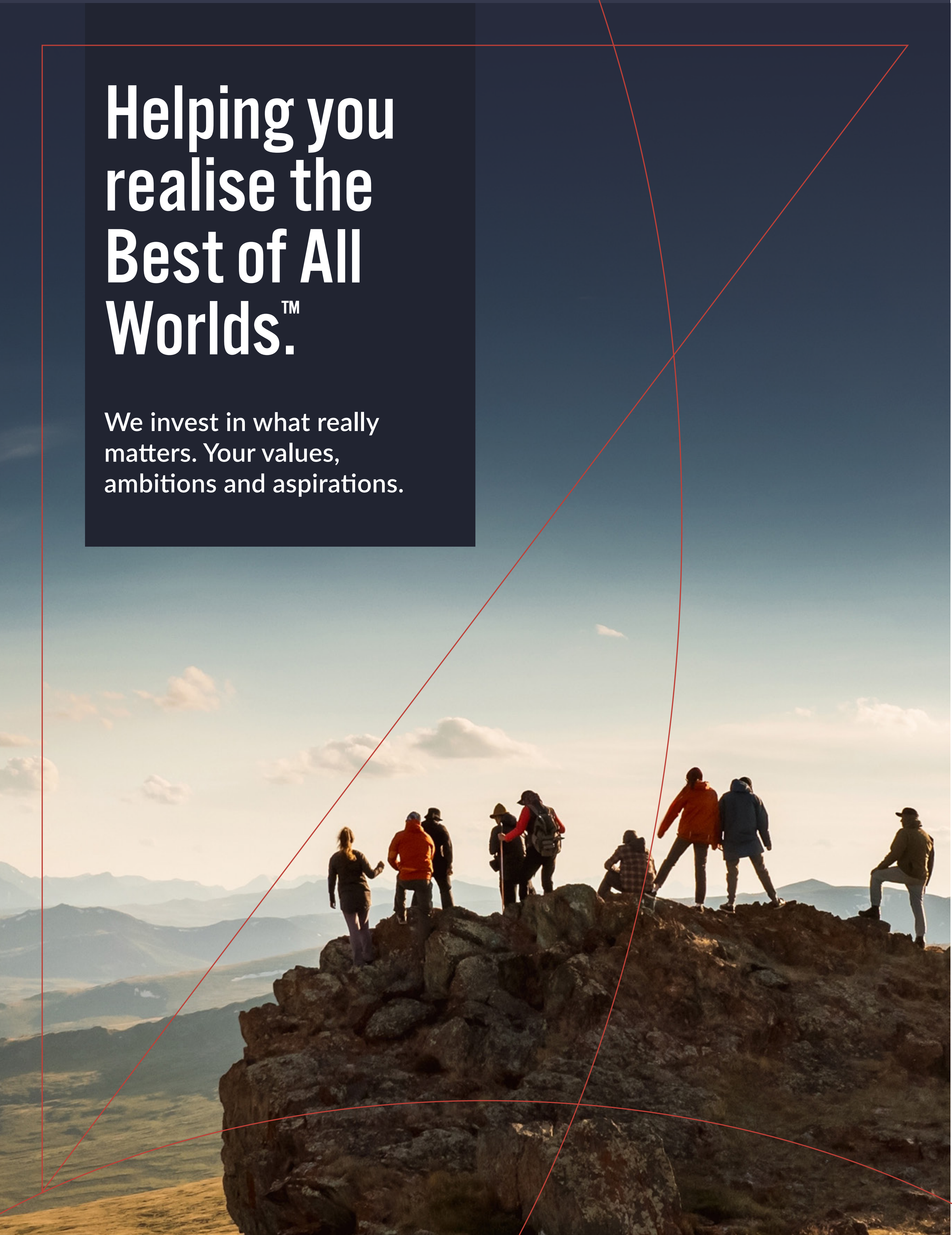
Our mission is to make a difference. We believe that by working together, we can create positive change and a brighter future for everyone. We actively support initiatives that improve the communities around us, and at every opportunity, enable colleagues to lend a hand.

Fact-Based Futures

Facts, not fads, informs our research-driven decision making. Closely aligning sustainability strategy to commercial goals, our governance is clear and accountable, placing long-term sustainability over short-term profits. We work hard to foster a safe, equitable, and inclusive work environment.

Helping you realise the Best of All Worlds.™

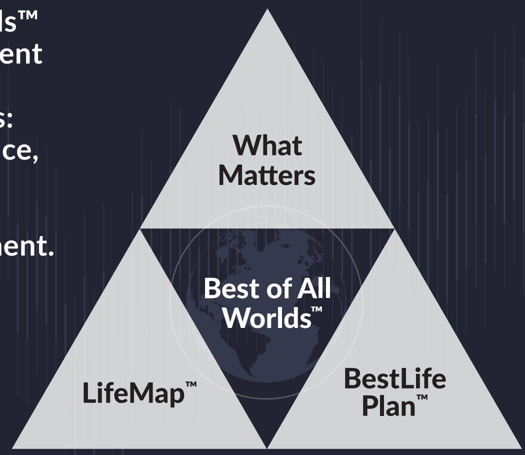
We invest in what really matters. Your values, ambitions and aspirations.



Working in partnership to make a difference

Throughout our journey we have listened to, and worked with, thousands of families to enable them to make choices on how they can craft their best life. We have gathered data and experience and created a three-part program – Best of All Worlds™ – to help clients live a rich and thriving life.

Our Best of All Worlds™ program and investment philosophy is built on three powerful pillars: relationship-led service, advanced wealth planning, and expert investment management.



Advanced Planning
Aligning our client families investment strategy with their priorities and goals allows us to tailor a **wealth plan** that's not just about financial objectives, but also reflects each family's future ambitions and their desired impact on the world.

Investment Management
Our tailored product offering is designed to meet each client family's specific goals, whether focussing on preserving wealth for future generations or actively investing in a sustainable economy. By combining a wide range of financial tools we can create a financial ecosystem that is as unique as the individuals we work alongside.

Relationship Led
Providing exceptional service is at the heart of everything we do and we're proud to have a 92% Net Promoter Score – a testament to the trust our clients place in us. We don't just manage wealth; we partner with our clients on their unique journey.

Playing our role in a better earth for everyone.

Aligning our commitment to environmental and financial stewardship.

Recognising the value of sustainability

At MASECO, our commitment to environmental stewardship is embedded in our daily operations. We strive to minimise our impact through conscious choices, from the small-scale actions of our employees to our larger strategic decisions.

Recycling and Reduction
Our internal policies prioritise recycling and waste reduction, ensuring that materials are disposed of responsibly and that we minimise our contribution to landfills. We have embraced digital alternatives where possible, reducing our reliance on paper, and thereby conserving valuable natural resources.

Office Space
Our office is located within the Kodak Building, Keeley Street, which has achieved outstanding sustainability benchmarks, including WELL Gold and BREEAM Excellent certifications. It incorporates features including 13,306 square metres of roof-mounted photovoltaic panels, a roof terrace with greenery to enhance biodiversity, and basement facilities like showers, changing rooms, and bicycle parking to encourage sustainable commuting.

Internal Education
We regularly provide internal educational pieces and training to our employees, raising awareness about environmental issues and promoting sustainable practices both in and out of the workplace.

Investment Vehicles
Our environmental commitment is not limited to our internal operations; it is also reflected in the products and services we offer our clients. Our Low Carbon Centric (LCC) portfolios prioritise investments with low carbon footprints or those that contribute to a low-carbon economy.

Additionally, the launch of our Separately Managed Accounts (SMAs) provides another avenue for environmentally-conscious investing. SMAs offer more customisation in investment strategy, approach, and management style than mutual funds do. This allows for a more personalised approach, working with clients to create portfolios that specifically exclude or include companies based on their sustainability-linked performance.

RESILIENT COMMUNITIES

Our mission is to make a difference.

We believe that by working together, we can create positive change.

Creating a better future starts with investing in both our people and our communities

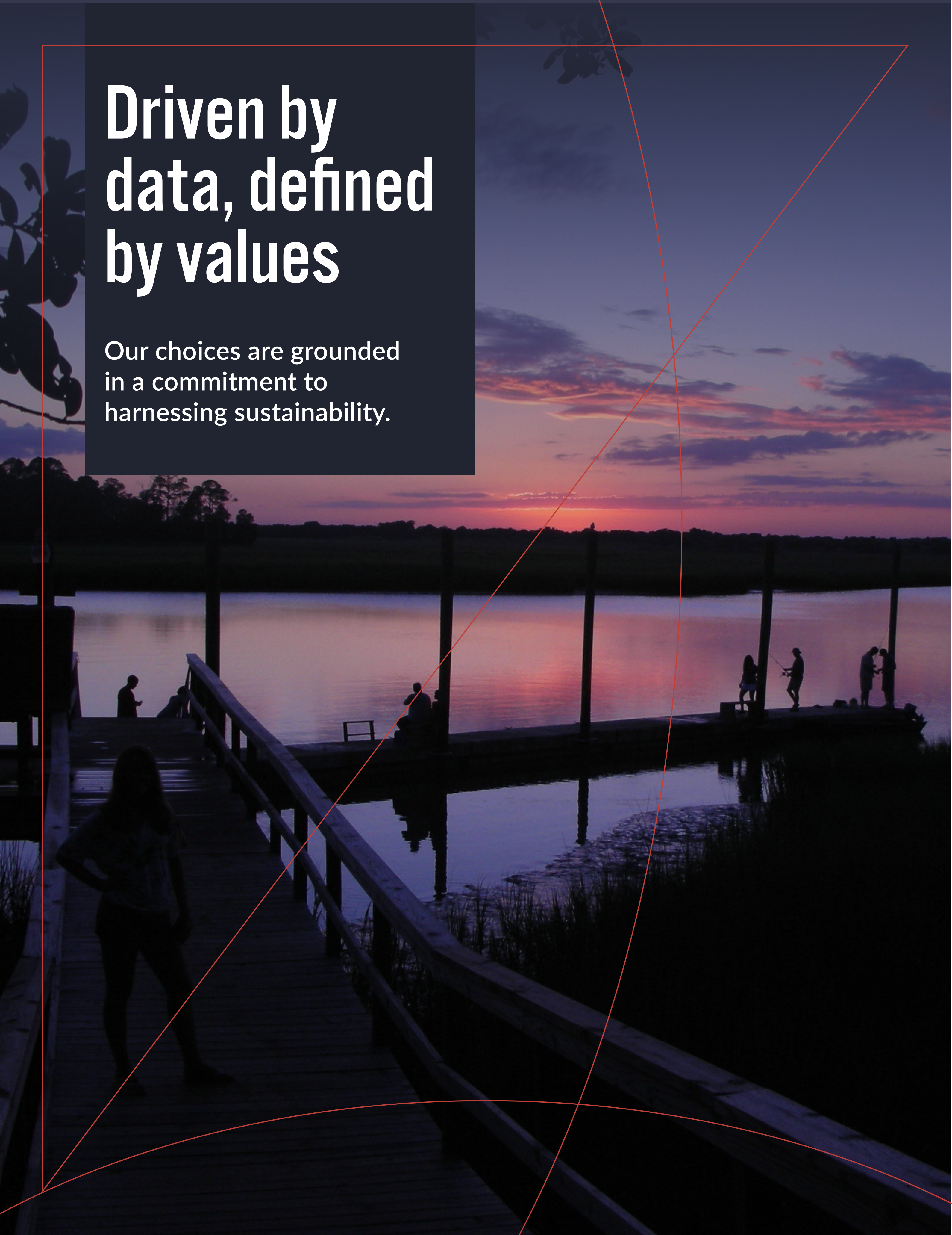
We actively support initiatives that improve the communities around us and, at every opportunity, enable colleagues to lend a hand.

Team Building
We believe that strong communities start with a strong team. We foster a supportive and rewarding workplace culture through a number of initiatives, including internship programs, volunteering support, extensive professional development opportunities, and a dedicated culture committee to ensure our team's voices are represented inclusively.

Health and Wellbeing
We also support our employees' physical and mental health with initiatives such as wellbeing days, medical insurance, eye tests, and a holiday purchase scheme. For our expat staff, we have introduced the option of working abroad, to ensure they can spend valuable time with their families. This commitment to our team is a core part of our philosophy and goes a long way to explaining why we've never had a wealth manager leave – a testament to our workplace culture.

Charitable Support
Beyond our team, we are committed to making a tangible impact on the wider community. We provide continuous charitable support to organisations like LondonSports and Providence Row, and we also make a donation for every client family we onboard.

Empowering Clients
We also believe in empowering our clients to make a difference. By encouraging philanthropic impact through educational webinars and investment options such as our Low Carbon Centric (LCC) portfolios, we enable families to align their financial goals with their desire to create a more resilient and sustainable community.



Driven by data, defined by values

Our choices are grounded in a commitment to harnessing sustainability.

Facts, not fads, informs our research-driven decision-making

As a forward-looking business, our goal is to generate sustainable growth and deliver stakeholder value, while upholding our environmental and social responsibilities. We feel passionately about championing business practices that limit negative impacts and amplify positive effects on society at large.

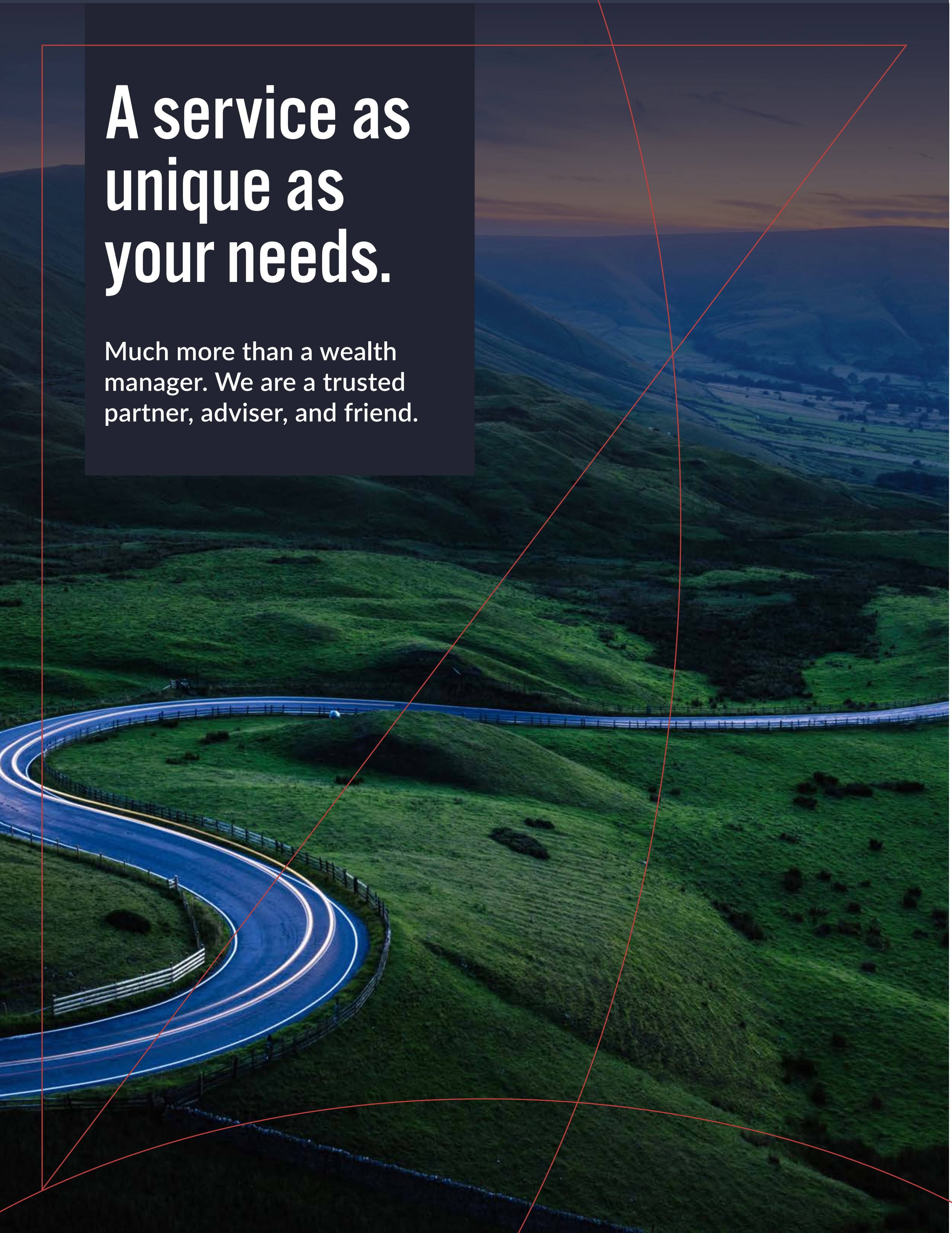
Sustainability by Design
Our commitment to sustainability cuts across every aspect of our operation, from our office environment to our investment strategies. It influences our decision-making process, from prioritising eco-certified buildings for our offices and selecting suppliers who share our values, to operational decisions on structuring our Low Carbon Centric (LCC) portfolios.

Future Leaders
We are also deeply invested in building a pipeline of future leaders. Through our internship and talent development programs, we provide hands-on experience that helps shape the next generation of financial professionals. We currently have a placement student who, after completing their degree, is set to join our team in 2026.

Thought Leaders
We believe that sharing knowledge and working collaboratively is essential for driving positive change. That's why we are active participants in industry-shaping networks, where our leaders provide expert commentary and help to influence the future of finance, while keeping at the cutting edge of sustainable thinking.

Client Networks
Andrea Solana, Head of Advanced Planning also spearheads a female focused forum. Creating a community to empower women with the tools to navigate societal gender biases that can impact their finances over time as well as supporting the unique issues US families face relocating to the UK.

Pioneering Spirit
The story of MASECO is punctuated by firsts. Continually breaking new ground, MASECO is proud to be a pioneer in: leveraging a US platform; securing tax efficient funds in both the UK and the US; providing US, UK, and Offshore Custody services; and introducing IRAs, 529s, and SIPPs for US families in a single offer. It is this drive to always look for better and more innovative ways of doing things that epitomises MASECO's approach to sustainability.



A service as unique as your needs.

Much more than a wealth manager. We are a trusted partner, adviser, and friend.

A history of service excellence and innovation

Every step of the way, we've supported high and ultra-high-net-worth US and UK families to flourish around the world, with tax efficient solutions and strategies tailored to each client's unique circumstance.

MASECO is driven by an evidence-based approach and award-winning multi-jurisdictional expertise, delivered by dynamic and intellectually rigorous experts. In short, we provide the niche insight and guidance necessary to enable our clients to navigate their wealth, their way.

Our service offering is focused on individuals with at least $/£1,000,000 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 depending on their circumstances. We work closely with you to develop a deep understanding of your wealth goals, 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 MASECO, you pay an annual fee based on assets under management, which is subject to a minimum fee. The service delivers our investment expertise as well as our wealth planning expertise to ensure that you always maintain a structure and strategy for your unique needs. 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.

MASECO

For life's financial complexities, it's reassuring to know you're not alone. If you feel you could benefit from MASECO's experience and expertise, we would be delighted to hear from you.

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