

An aerial photograph of a city waterfront, likely San Francisco, showing a large ship docked at a pier, a curved promenade, and various buildings. The image is overlaid with a blue tint.

SOVEREIGN™

SOVEREIGN ASSET MANAGEMENT

SAM is not tied to any private bank or asset manager and is committed to delivering genuinely objective and impartial financial guidance, as well as enhanced levels of oversight and security.



Introducing SAM

Sovereign Asset Management Limited (SAM) is the division of The Sovereign Group that provides asset management services to Group clients. Our goal is to help you grow your wealth, enjoy it and pass it on to future generations.

SAM employs a professional approach to asset management. Our focus is on leveraging the collective strength of our clients to access the very best banking services and investment opportunities available – and to negotiate the lowest possible charges – on behalf of our clients.

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Established in 1987, The Sovereign Group provides the full range of wealth management services from over 20 strategically located offices worldwide. In addition to our core service of setting up and managing companies, trusts and other structures, we offer tax planning, legal and insurance services, as well as yacht registration.

SAM was formed as a stand-alone, fully regulated asset management firm in 2000. It is based in Gibraltar – a British overseas territory that is within the European Union – and regulated by the Gibraltar Financial Services Commission.

A woman in a white shirt is smiling and talking to two other people in a meeting. She is holding a pen over some papers on a table. There is a laptop and a coffee cup on the table. The background is blurred.

Investing through SAM can not only make entry levels more accessible but, where appropriate, SAM can overcome portfolio standardisation and secure the best terms and service levels for its clients.

Who manages your assets?

We live in an era when asset security is a fundamental priority. SAM never holds client money in its own name. Funds are always lodged with universally recognised custodians. SAM will undertake due diligence on behalf of its clients as well as review performance and asset allocation to ensure that client requirements are always being met.

Over the years SAM has grown its assets and developed relationships with custodian banks and brokers. This enables our clients to enjoy privileged access to many of the major names in private banking and asset management.

Private banks and asset managers often 'pigeon hole' their clients according to fairly broad criteria – usually based on the size of their investible assets.

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As part of SAM, clients can therefore gain access to active advice, as well as products and services usually reserved only for large clients, which are better suited to their specific circumstances and investment criteria.


Better Service

SAM has the ability to work with the chosen Investment Manager and tailor the asset allocations to ensure that the portfolio has the appropriate balance of investments to reflect the clients risk profile and objectives. Having a second level of oversight by an independent but regulated company such as SAM can be a valuable check and balance.

SAM is not paid by the client but instead receives a share of the standard fees as charged by the banks, brokers or fund houses to whom we introduce the account, therefore no additional fees are charged by us.

So in simple terms, we offer two levels of expertise for the price of one - knowledge of the capabilities of the available banks and a valuable oversight over what they are doing with your money.

Frequently, but not always, we advise that the account is best held in the name of a structure whether that be a trust, company or foundation. This can have distinct tax, confidentiality, asset protection and estate/dynastic planning advantages. Whether these advantages exist in your case is worth considering but not a necessary part of the offering.



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Adding value and focus

SAM has many years of experience working with external investment managers and assisting clients in the choice of private banking services on an informed basis. SAM is able to provide comprehensive information on the suitability of a bank to suit clients' individual needs. Moreover SAM offers privileged access to ensure all clients receive the best possible terms.

SAM will also be closely involved in the ongoing investment strategy that will be specific to each client.

This additional service comes at no extra cost to SAM's clients. Wherever possible, SAM will use its influence to ensure that its clients receive discounts to the standard quoted fees. In this way a client's costs will never be greater – and may actually be lower – than the standard rates.

To find out how to maximise the potential of your investment portfolio, contact SAM for an initial, no obligation, consultation.



A photograph of a man in a patterned shirt and shorts lifting a child horizontally in the air on a beach. The child is laughing with their mouth open. The background shows the ocean and a clear sky. The entire image has a light blue tint.

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your wealth, enjoy it and pass it
on to future generations.**



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