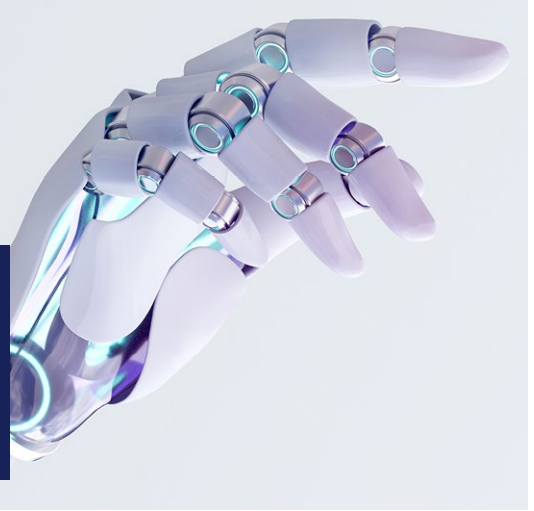




HSG Innovation Trophy 2024



Case 1: Beyond the obvious: Unlocking the storytelling potential of Private Equity

Background:

Private Equity has the unique power of inspiring clients and stimulating engaged conversations in meetings. Private clients are often entrepreneurs themselves and can relate well to other entrepreneurs raising capital to expand their geographical footprint or dealing with succession planning. LGT's access to Private Equity is unique and often a door opener to the LGT Private Banking world. Nevertheless, the subject matter is complex.

The challenge:

It is often a challenge to transmit the attractiveness of Private Equity with enough depth and examples to the end client both when introducing a new investment opportunity but also to update on the progress of a fund. Time and attention span of a human being is limited, and some funds are diversified across more than 1000 portfolio companies through multiple layers which makes it hard to unlock the emotional value of a single company. We are currently using conventional tools such as factsheets, presentations, teaser videos, webinars, and after-sales reports to inform clients.

The question:

How can we unlock the storytelling potential of Private Equity?

- What tools/methods for in-person discussions but also digital interactions can we add?
- How can we create a holistic client experience around Private Equity which will be totally unique to LGT?
- What storytelling concepts from other industries could be applied and what challenges do we have to take into consideration?

You have the freedom to either present a) a holistic experience concept around Private Equity or b) focus on specific initiatives/tools with exceptional value add. **Think beyond the obvious!**

Case 2: Impact of AI and digitalization in private banking on “next generation” needs?

Background:

The client base of wealth management banks is aging, and it is only a matter of time before the "next generation" takes over. Add to this the dimension of AI and digitalisation, which will change the way banking is done in general. In this context, the way people interact with a bank will also change.

The Challenge:

In order not to miss out on the future interaction needs of the "next generation", LGT must adapt its value proposition and communication channels early enough.

The Question:

How does the “next generation” of today's clients want to interact with a wealth management bank?

- What media do they want to use?
- To what extent is physical contact still relevant?
- What role does sustainability play in asset allocation?
- To what extent do they want to be involved in investment decisions?
- How would you like to be informed about your asset allocation?

Case 3: How simple can sustainable investing be? – Transforming complicated concepts into tangible client services

Background:

There is no single unified definition of Sustainable Investing – people understand it differently, if it's being understood at all. On the other hand, our owner, the Princely Family of Liechtenstein, has been investing sustainably for generations, and the dedication to sustainable investing reflects our owner's core values. We at LGT are committed to partnering with our clients to investing sustainably in order to support sustainable development.

The Challenge:

Time is short, and the financial markets play a crucial role in driving sustainable change. We at LGT have an in-depth expertise as well as a comprehensive offering to optimise portfolios in terms of risk, return and impact. However, LGT's sustainable advisory expertise and services are not fully known to our clients, due to the complexity of the topic. LGT must optimize its positioning and story-telling of sustainable advisory offering.

The Question:

How to transform the complicated concept of sustainable investing and ESG regulations into tangible client services?

- How do people understand sustainable investing in general?
- What SI approaches/themes are the most understood? (Best-in-class, exclusion, engagement, impact investing etc.)
- What can be new formats/contents/storylines for LGT's sustainable advisory offering?
- What could be the sustainable investment needs for clients in 5 years?