Monaco | At A Glance

Our Mission

To enable our clients' success by delivering the industry's best people, insights and acumen along with the unmatched global capabilities and access of Citi

Clientele

Family offices, Entrepreneurs, Senior Corporate Executives, Financial Sponsors, Property Investors, Inherited Wealth

26,000 clients globally including a quarter of the Forbes list of billionaires

Global Financial Advisor to more than 4,000 of Europe's most successful and influential families

Wealth Management with Institutional Capabilities

World class liquidity and deposit management.

A trusted adviser offering objective solutions in wealth structuring based on Citi Investment Research and industry leading global resources.

Extensive product platform, leveraging the complete range of products and services from "all" Citi businesses.

An "open architecture", institutionalised process to access "best-in-class" products from other providers. A significant proportion of investments in clients' discretionary managed portfolios could be non-proprietary.

Clients have access to innovative and customised opportunities in private equity, hedge funds, real estate, managed futures and structured products. This may include participating in co-investment opportunities with Citi whereby mutual commercial interests are totally aligned.

Family and next generation advice; philanthropic service and art advisory service.

Tailored Service

A dedicated trusted advisor who understands clients specific investment needs, structure and area of interest.

Team-based approach: the trusted advisor is complemented with a team of financial experts and corporate resources. These could include a credit specialist, an investment counsellor, a portfolio strategist, a capital markets specialist and wealth structuring adviser.

Privacy, Confidentiality, Transparency

We emphasise performance, value-added advice, global capability, privacy and confidentiality, which are the driving business standards. Our aim is to be the client's "global trusted advisor".

Investment Approach

Suitability: profiled by risk-return appetite and recommended appropriate products and opportunities from various asset classes cash and equivalents, fixed income securities, equities, hedge funds, and illiquid investments such as real estate and private equity.

Portfolios are tailored to meet specific needs. Citi employs a unique approach to portfolio construction, understanding that the choice of assets is the most important contributor to performance. The methodology is called "Whole Net Worth".

This proprietary model provides optimised allocation recommendations across virtually all asset classes. Whole Net Worth assesses a portfolio's underlying risk by more accurately gauging the risk across asset classes and includes illiquid investments. Risk is measured both in normal and extreme market conditions. This is a forward looking approach that can be customised for each relationship.

Advisory approach: regular interaction with investment specialists to ensure opportunities are taken advantage of as they occur.

For Information, please contact

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Citi's Capabilities

Investment Solutions

- Co-investment Opportunities
- Alternative Investments
- Portfolio Management
- Global Wealth Structuring
- Capital Markets
- Managed Investments
- Trust and Estate Services
- Custody Services

Investment Finance

- Tailored Lending
- Commercial and Residential Real Estate Financing
- Real Estate Investment Advisory
- Capital Call Funding
- Aircraft Financing
- Art Finance

Liquidity and Banking

- Banking
- Cash Management
- Cash Deposits

Advisory Services

- Family Advisory Practice
- Art Advisory Service
- Philanthropic Advisory Service

Consultative discretionary: dialogue and consensus between the client and trusted advisor.

Discretionary model: trusted advisor will introduce discretionary managers to build a portfolio designed to meet each client's risk-return profile.

Innovation

Citi Investment Research is utilised by Citi Private Wealth Management as a source of unique insights. The intellectual capital employed examines themes which capture and in some cases drive current market thinking.

The Relationship Report – A fundamentally different approach that allows clients to view individual accounts or consolidate summaries of banking, brokerage, credit, custody and other investment accounts with the Citi Private Wealth Management. The report, available in different languages can also display the connections among individual, family, business and trust accounts.

International Reach and Standing

Part of the Citi family – 6 continents; 96 countries; 128 currencies; 200 million customer accounts.

Global Wealth Management – 100+ offices; 70+ cities; 30+ countries. We believe in building strong onshore wealth management capabilities, a demonstration of our commitment to develop locally denominated financial products and contributing also to the growth of the local financial services sector.

Offices (Europe): Athens, Barcelona, Geneva, Istanbul, Jersey, London, Madrid, Milan, Monaco, Tel Aviv, Valencia and Zurich.