



UTMOST WEALTH SOLUTIONS WHO WE ARE

UTMOST GROUP PLC


A SPECIALIST
wealth solutions provider



530,000
customers (approx.)




Expertise,
SCALE
and a sustainable
business model




8 Office Locations

UK, Isle of Man, Ireland,
Guernsey, Switzerland,
Dubai, Hong Kong
and Singapore




£58.4bn
(€65.4bn)
in assets under
administration (approx.)

AWARD
winning proposition



INTERNATIONAL INVESTMENT AWARDS 2022 WINNER
BEST INTERNATIONAL LIFE GROUP (NON-UK)



INTERNATIONAL ADVISER GLOBAL FINANCIAL SERVICES AWARDS '22 WINNER
INTERNATIONAL LIFE GROUP (UK)

INTERNATIONAL INVESTMENT
Best International
Life Group (Non-UK) 2022


INTERNATIONAL ADVISER
Best International
Life Group (UK) 2022

Combined figures for the Utmost Group as at 31 December 2022.


UTMOST PANEUROPE DAC (TRADING AS THE BRAND **UTMOST WEALTH SOLUTIONS**)

extensive
UK & EUROPEAN MARKET


UK, Italy, Spain, Portugal, France, Sweden and Finland



PORTABILITY¹



Innovative solutions for internationally mobile clients




We offer **investment and savings solutions** for **affluent, high-net worth** and **ultra-high-net worth** individuals in **Europe**


Fitch Ratings

'A' Insurer Financial Strength Rating with a **Positive Outlook²**

located in
IRELAND



since
1999




Specialist teams of experienced **PROFESSIONALS** comprising **14 nationalities**

AKG

'B+' Financial Strength Rating **Very Strong³**

0% VAT on **Discretionary Fund Management Fees**



Our uniqueness centres on our **understanding** of the **fiscal, legal** and **regulatory regimes** in **each jurisdiction** where we operate

A WEALTH of DIFFERENCE

Utmost PanEurope dac is regulated by the Central Bank of Ireland (No 311420). Its registered office is Navan Business Park, Athlumney, Navan, Co. Meath C15 CCW8, Ireland. Utmost PanEurope dac is a Category A Insurance Permit holder with the Jersey Financial Services Commission.

Utmost Wealth Solutions is registered in Ireland as a business name of Utmost PanEurope dac.

All promotional material has been approved by Utmost International Distribution Services Limited which is authorised in the UK by the Financial Conduct Authority. Financial Services register number: 1007096.

The rules made under the Financial Services and Markets Act 2000 (as amended) for the protection of retail clients in the UK do not apply.

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¹ As personal situations change, we will outline the implications and provide you with options you may use to meet your clients' needs. ² As at 16 June 2023. ³ As at 14 September 2022.

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utmostTM
WEALTH SOLUTIONS