



SJT WEALTH

Since 2014

2021

An Introduction

Agenda

What this introduction covers



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Who We Are



SJT WEALTH

Since 2014

Our Company

SJT Wealth are Wealth and Risk Management Advisors, originally founded in 2014, with offices in London. We specialise in wealth management and offer a professional service for companies and private individuals. The principles that form the cornerstone of our business are to provide clients with a personal service, innovative solutions, and a focus on long-term success. We offer choice, transparency and accountability, building strong relationships that are founded on trust.

We aim to exceed your expectations, giving tailored solutions to your specific goals, in a friendly and easy to understand manner. Our staff have satisfied rigorous criteria, relating to professional qualifications and ethical good practice, giving clients the confidence that they are dealing with a leading firm, wholly dedicated to providing the best possible advice, service and support.

Highlights and Key Updates



SJT WEALTH

Since 2014

We recorded 8% growth.

Our company managed to increase our growth from the start of last year, with more people looking for safer options for their money.

Our people count grew by 5%.

Growth means more quality trained employees to assist our clients at all times throughout the year.

4% of our growth in 2020 came from the wine.

The wine market and its customers are bubbling once again.

Highlights and Key Updates

**Our large enterprise segment
contributed the most revenue
at**

40%

An area that we have begun to increase our resources into since
2019.



Key Points of 2020

Q2

Appoints Neil Tran as
Chief Financial Officer

Q4

Acquires 2 investment
companies

Q1

Moves to remote
work permanently

Q3

Hires
100 new employees

Year-End

Posts 8% growth

Balance

As of January 1, 2021



£112,456

Assets

(+25% from last period)

£26,911

Liabilities

(-25% from last period)

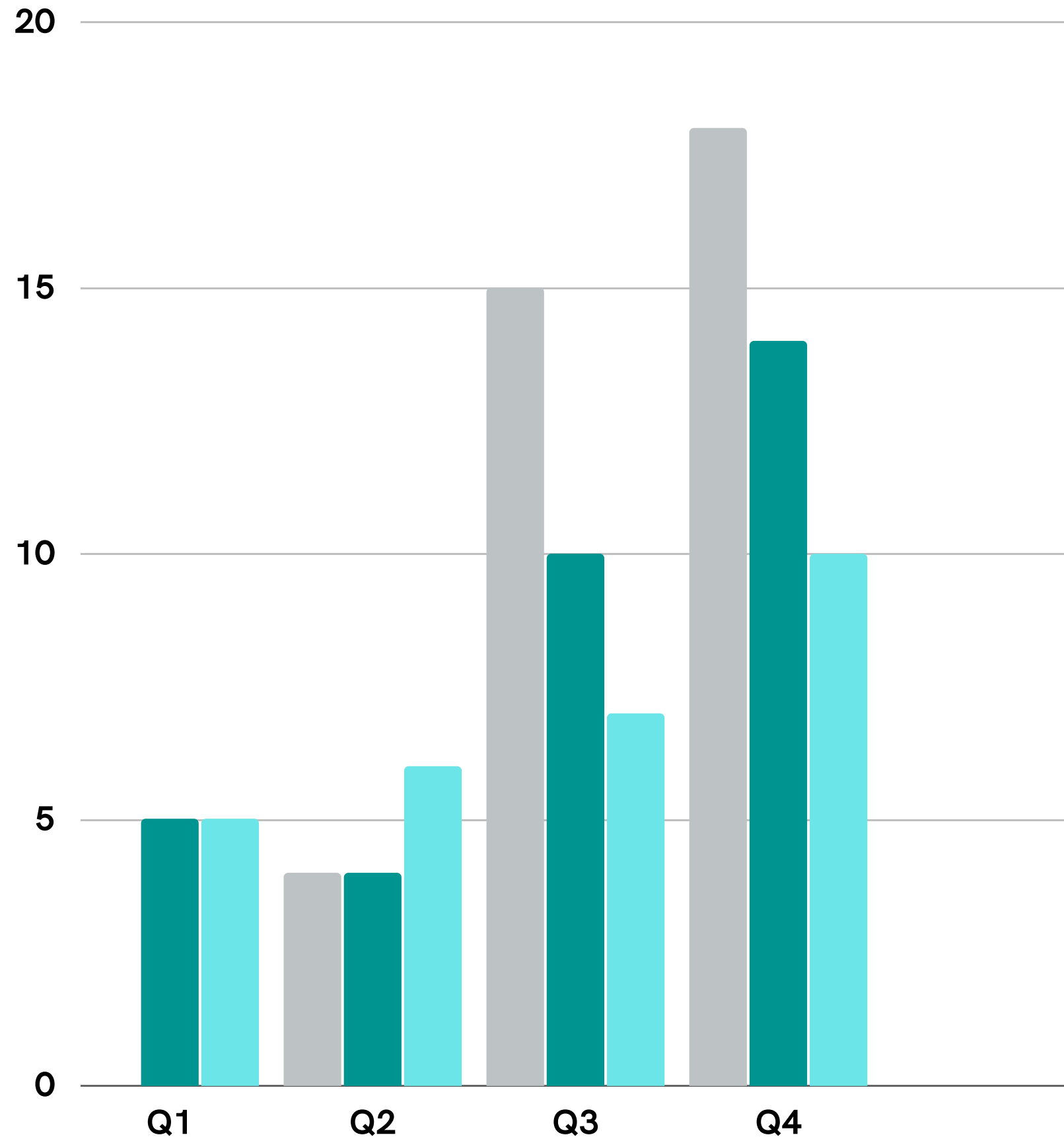
£1,323,456

Equities

(+20% from last period)

Net Income

Per Month



Net income steadily rose
in Q3 and Q4.

How We Do It



SJT WEALTH

Since 2014

All weather portfolios, to perform well whichever way the market moves

When creating portfolios for clients, we seek to strike a balance between investments that should prosper when financial markets are favourable and those that provide shelter during market downturns.

The investments we hold for favourable conditions are often equities, and we think of them as growth assets. Those providing shelter are our protective assets, and they are usually a combination of conventional and index-linked bonds, currencies, commodities and derivatives.

If circumstances change, the same investment opportunity may move from being a growth asset to a protective asset – and vice versa.

To avoid being dependent on the direction of markets, we always hold growth and protective assets alongside each other, varying the allocation to each over time.

Environmental, social and governance issues



Striving to be a responsible investor



Actively integrate environmental, social and corporate governance (ESG) issues into our investment process.



We believe good practice is likely to support good corporate performance.

Thank you!

Feel free to reach out to us if you have any questions.

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