US Persons and Collateralised Lending

11 September 2024



We are excited to announce the launch of Julius Baer as an additional custody option, specifically for:

- US Investors (Citizens not Residents or Green Card Holders)
- Investors needing a Collateralised Lending facility

Since the loss of Royal Bank of Canada (RBC) as an available custody option, we have worked hard to identify a suitable alternative and are happy to announce our new offering via Julius Baer, a long-standing and well-renowned international custodian.

As such, there is a new US Persons and Collateralised Lending solutions document (available within the InfoHub under Resources > Solutions) which provides a comprehensive overview of the key features and processes involved with this solution.

Any questions then please do speak to your Relationship Manager.