

La Banque Transatlantique Luxembourg

Presentation of the Bank

Banque Transatlantique Luxembourg (hereinafter, the “Bank”) is a limited company with a share capital of € 59,181,000, registered as number B31730 with the Luxembourg Trade and Companies Register and as insurance broker 2009CM022 with the Commissariat aux Assurances [Luxembourg Insurance Commission].

Registered office: 7 Boulevard Joseph II 1840 Luxembourg I Correspondence Address BP 884 L-2018 Luxembourg
|Website: www.banquetransatlantique.com/lu

Registration as an insurance broker can be confirmed on the website of the Commissariat aux Assurances (www.caa.lu) or by sending it a letter to 11 rue Robert Stumper L-2557 Gasperich.

The Commissariat Aux Assurances is responsible for oversight of the company’s insurance brokerage activities. Its contact details are: CAA – 11 rue Robert Stumper L-2557 Gasperich.

Presentation of Groupe Banque Transatlantique

Banque Transatlantique Luxembourg is a wholly-owned subsidiary of Banque Transatlantique S.A. Groupe Banque Transatlantique has offices in Paris, around France and abroad through its subsidiaries in Belgium and Luxembourg, a branch in London and its representative offices in Canada, the United States, Spain, Switzerland, Hong-Kong and Singapore. Groupe Banque Transatlantique also owns a management company, Dubly Transatlantique Gestion (forged out of the merger of Transatlantique Gestion and Dubly Douilhet Gestion), in which Banque Transatlantique Luxembourg has a 5.02% interest.

Presentation of Groupe Crédit Mutuel Alliance Fédérale

Banque Transatlantique Luxembourg is wholly-owned by Groupe Crédit Mutuel Alliance Fédérale. As a result, it has financial ties of over 10% with a given insurance undertaking or the parent company of a given insurance undertaking, the companies belonging to Groupe des Assurances du Crédit Mutuel – ACM. Nevertheless, Banque Transatlantique Luxembourg is not under any contractual obligation to work solely with ACM.

Your life assurance and endowment contract broker

Banque Transatlantique Luxembourg, in its capacity as a broker, offers life assurance and endowment contracts to its clients and represents policyholders vis-à-vis insurance companies. It can also provide financial expertise from a broad range of asset management services.

To support its international clients, Banque Transatlantique Luxembourg has invested in a European passport for its life assurance brokerage business that covers most European countries (Belgium, Cyprus, Finland, France, Germany, Greece, Hungary, Italy, Malta, Netherlands, Poland, Portugal, Romania, Spain, Sweden). For its non-European customers, the Bank provides its brokerage services from Luxembourg or from the countries covered by the European passport.

Our brokerage business with “High-End” partners

Banque Transatlantique Luxembourg uses an impartial and tailored process to design solutions for customers. In this way, the Bank explores and designs life assurance investment solutions that are tailored to a client’s assets and goals.

To do so, the Bank has recourse to a series of high-end contracts developed together with leading life assurance partners established in Luxembourg. They were selected wholly independently based on their financial strength, the soundness of their administration and their cross-border insurance expertise.

The life assurance products allow our clients to better prepare their retirement and pass on their assets. They also enjoy tax advantages.

Remuneration policy

The remuneration received by the Bank is calculated on the basis of commission based on total assets. This commission is for the support provided to customers with respect to their investments and related decisions over the life of the contract. The stated fees are annual excluding applicable taxes. They are typically deducted quarterly.

Claims and disputes

All claims should be sent to: *Claims Department Banque Transatlantique Luxembourg – BP 884 – L-2018 Luxembourg*. The Broker undertakes to respond forthwith in an honest and professional manner. Should this fail to provide satisfaction, the policyholder is free to contact the Commissariat Aux Assurances (www.caa.lu) to have his/her claim dealt with.

Personal data protection

Your personal data is processed in order to provide you with a product that is tailored to your needs along with additional products or services. You have a right to access, edit and delete your data as well as a right to data portability and a legitimate right to object to processing of your personal data.

Questions? Contact us

If you would like more information on our services or want to set up a meeting to design an investment solution tailored to you, feel free to contact our advisers by email at btl@banquetransatlantique.lu or by telephone on **+352 46 99 89 1**.