tavistock WEALTH
REVOLUTIONARY THINKING

ADVANTAGE

ACCESS TO STATE-OF-THE-ART SOFTWARE
NOT OPENLY AVAILABLE TO ADVISERS

When a client chooses to invest
they trust you to select the best investment option.

OUR EXPERTISE IS IN MANAGING RISK
IT IS OUR ONLY FOCUS

ACCESS TO SOFTWARE RESPONSIBLE FOR:

33,000 portfolios globally
Approximately **$17 trillion** of client portfolio assets

PROVIDE YOUR RETAIL CLIENTS WITH INSTITUTIONAL QUALITY PORTFOLIO MANAGEMENT

ASSETS UNDER MANAGMENT

TOTAL ASSETS UNDER MANAGEMENT (AUM)

£600M+

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REVOLUTIONARY THINKING

Chief Investment Officer, Christopher Peel, oversees a **research driven investment** process. This combines **quantitative**, **qualitative** and **operational due diligence** across the passive and active fund management sectors.

All ACUMEN Portfolios and CIP PROFILES are set **specific volatility parameters** and are constantly monitored by our analysts. This ensures **strict adherence** to the criteria set by the Tavistock Wealth Investment Committee.

THE BENEFITS OF OUR PROPOSITION

We look after:

The **administrative burden** of running model portfolios
The **compliance burden** of conducting portfolio re-balances on an advisory basis
The **investment management burden** of running your own portfolios

...so you can look after your own ROI:

Reduce your risk of client complaints. **O**rganise your client bank. **I**ncrease your valuation.

JOIN THE TAVISTOCK REVOLUTION!

email us on **investments@tavistockwealth.com** or call

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