

AUTONOMY

WE CAN WHITE-LABEL OUR OFFERING FOR YOU...
OUR CIP. OUR EXPERTISE. YOUR BRANDING.

You can focus on **writing new business** and establishing
new client relationships.

**TAKE YOUR BUSINESS TO THE NEXT LEVEL
BECOME A MODERN DAY
WEALTH MANAGER**

RUN YOUR OWN MODEL PORTFOLIO SERVICE

AUTONOMY



LET'S LOOK AT WHAT YOU GET:

USING YOUR BRAND:

We will provide:

- Model portfolios with the name of your choosing
- Marketing literature to suit your clients and preferences
- Branded monthly factsheets to suit your requirements
- Branded monthly performance email
- Branded mid-month performance email
- Customised mailing list of your clients
- Compliance approval for all of the above

**YOU GET YOUR TIME BACK
TO WRITE NEW BUSINESS**



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. Organise your client bank. Increase your valuation.

JOIN THE TAVISTOCK REVOLUTION!

email us on investments@tavistockwealth.com or call

01753 867000