

PROTECTION

MANAGING CLIENT PORTFOLIOS YOURSELF COMES WITH **INHERENT RISKS**

The client **agrees their attitude** to risk.
The provider **invests their money** in a portfolio.

THE SUBSEQUENT RISKS... **ARE ALL YOURS**

LET US SUMMARISE YOUR CHOICE

YOU, THE ADVISER

**YOU MUST MATCH CLIENT ATR TO AN
INVESTMENT PORTFOLIO
(FUND MANAGERS SELL TO YOU)**

**YOU MUST ENSURE VOLATILITY OF
INVESTMENT PORTFOLIO IS
APPROPRIATE AT ALL TIMES**

**YOU OWN ALL THE RISK IF CLIENT
COMPLAINS**

**INTERESTS ARE NOT ALIGNED BETWEEN
YOU AND THE FUND MANAGER**

THE RISKS ARE ON YOU



PROTECTION

WITH TAVISTOCK WEALTH

**YOU MUST STILL MATCH CLIENT ATR TO AN INVESTMENT PORTFOLIO
WE MANAGE PORTFOLIOS TO THE SPECIFIC VOLATILITY TARGETS THAT
DEFINE A CLIENT'S ATR**

**CURRENCY HEDGING ENSURES PORTFOLIO VOLATILITY REMAINS ALIGNED
WITH CLIENT'S ATR**

OUR INTERESTS ARE ALIGNED WITH YOU AND YOUR CLIENT

RISKS ARE MITIGATED

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