

PROFITABILITY

MANAGING PORTFOLIOS COSTS TIME AND MONEY **YOUR TIME AND YOUR MONEY**

The provider invests **your client's money** in a portfolio.
As the adviser, **you must ensure** it performs within its volatility range.

WHEN A PORTFOLIO DOES NOT PERFORM WITHIN IT'S VOLATILITY RANGE **YOU MUST TAKE ACTION!**

THE ACTION YOU MUST TAKE

YOU, THE ADVISER

**YOU MUST MONITOR THE INVESTMENT, WHICH THE
FUND MANAGER HAS "SOLD" TO YOU**

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

**YOU ARE ACCOUNTABLE IF THE CLIENT COMPLAINS
YOU WILL SPEND TIME AND MONEY DEALING WITH
COMPLAINTS**

THE PROVIDER WILL HAVE NO LIABILITY

**YOU OWN THE RISK
YOUR PROFITS WILL SUFFER**



PROFITABILITY

WITH TAVISTOCK

WE MITIGATE FOREIGN EXCHANGE RISK THROUGH GBP HEDGED SHARE CLASSES

WE PROVIDE INSTITUTIONAL QUALITY RISK MANAGEMENT

OUR PORTFOLIOS ARE MANAGED TO THE SPECIFIC VOLATILITY TARGETS, AS DEFINED BY OUR CLIENT'S ATR

WE MANAGE COMPLIANCE BURDEN

WE MANAGE ADMINISTRATION BURDEN

ALL INCLUSIVE SERVICE FOR 0.00% DFM FEE

OUR INTERESTS ARE ALIGNED WITH YOURS

**SAVE YOUR TIME AND YOUR MONEY
YOU FOCUS ON YOUR 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