

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 MANAGEMENT
TOTAL ASSETS UNDER MANAGEMENT (AUM)
£900M+



ADVANTAGE

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. Organise your client bank. Increase your valuation.

JOIN THE TAVISTOCK REVOLUTION!

email us on investments@tavistockwealth.com or call

01753 867000