

Best Independent Financial & Investment Planning Firm – East of England

The financial advice market is competitive, with many firms vying for the attention of many potential investors or those simply looking for financial assistance. And, to succeed, these firms must find more creative ways to stand out from the competition. Tavistock Private Client does so by providing retail clients with access to institutional quality solutions at a great price with a considerable breadth of solutions at hand.

Tavistock Private Client is an independent financial advisory firm that has provided financial support and built strong relationships with its clients for decades. It now manages the personal wealth of thousands of people, providing financial planning and advice services to help create, grow, and protect clients' wealth.

The firm offers an online platform that allows clients paperless access to every element of its portfolios, including quick snapshots of current holdings to complete breakdowns of the fund's performance and contributions, 24/7. This platform – and the accompanying team – provides three dedicated services for its clients. It boasts a fully holistic, independent advisory service for individual clients, employee benefits for corporate clients, and a simplified advice process directly supporting the employees of its corporate clients through the employer benefits service.

Tavistock works with its clients to create financial plans that can last a lifetime. The team provides consistent informed advice on how best to manage investments, assessing the current state of its client's finances before it assesses risks and regularly reviewing the implemented strategies – to ensure the plans stay on track.

The investment strategy recommended will be tailored to its client's needs and goals, ranging from low-cost model portfolio solutions to more expensive bespoke and discretionary managed portfolios. Tavistock deals in equities, bonds, structured products, and much more, giving prospective clients a catalogue of trading options. Additionally, all plans and options are assessed through Tavistock's Centralised Investment Proposition, pitting strategies against others to ensure they are appropriately set up for success. All of this is expertly done before its advisors recommend them.

A differentiating factor of the firm is how granular its financial advisors are in this planning and research process. Beyond just researching the market and its trends, the team works through a myriad of 'what if' scenarios and information on the market to ensure maximum clarity with each plan. Additionally, it establishes a two-way system of transparent communication before its implementation and invites clients to reach out for an unimpeded view of their finances.

At every stage, the team analyses the performance of its clients' investments compared to its their financial plan. The team won't hesitate to reach out with updates and recommended changes when

things need improving. This regular monitoring ensures that plans remain on track to achieve the desired goals.

The UK Government endorses valuable tax reliefs to encourage investment into smaller, start-up businesses, and this area of investment is at higher risk. Where appropriate the team utilises a robust selection process for favoured EIS and VCT opportunities and can help clients to build up a portfolio of high-performing managers.

Investments through Tavistock attract government-approved tax incentives, and the team works to make its clients' affairs as tax efficient as possible. With a skilled team of pension planning specialists, Tavistock identifies objectives, reviews existing arrangements, and helps its clients to obtain the best solution for their circumstances and needs. The team also helps clients to navigate the complex pension landscape with advice on funding, Tapered Annual Allowances, and Lifetime allowances for pensions.

Alongside retirement the firm also assists with estate management, guiding clients on how best to make sure their money goes to who they want when the time is right – and for the right reasons. The team assists in this endeavour in many ways, including managing (and in some cases reducing) its client's Inheritance Tax bills and setting up liaisons with appropriate parties alongside or on the client's behalf.

This is far from an exhaustive summary of the firm's services and provisions, such as its advisory network, insurance investigations, DIY investing options, and much more. Tavistock is a trading and investment solution with both quantity and quality of its services, offering a staggering suite of broad and bespoke options – alongside a team that excels in bringing success and profitability to its clients through in-depth and nuanced financial plans. Its sheer scale of services combined with the skilled human touch of its team is why Tavistock Private Client stands above as the Best Independent Financial & Investment Planning Firm in East of England.



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