tavistock PRIVATE CLIENT
REVOLUTIONARY THINKING

HOW WE WORK

Tavistock Private Client follows a carefully designed financial planning process so that you know exactly what is happening at each stage of its six steps:

1 ENGAGEMENT

An introductory meeting to fully explain how our service works, identify your primary objectives and answer your questions.

2 DISCOVERY

Here we start to fully understand your objectives so that we can develop well defined goals.

3 RESEARCH & ANALYSIS

This is where we develop your Personal Financial Plan. We do this by covering a series of critical steps:

4 PRESENT RECOMMENDATIONS

We'll discuss the Personal Financial Plan we've developed specifically for you, setting out the realistic recommendations designed to achieve your goals.

5 IMPLEMENTATION

Once you fully understand your plan and our recommendations, we put it into action.

6 ONGOING SERVICE & RELATIONSHIP

You can agree to an ongoing service from us. This allows us to follow the critical steps to ensure your plan stays on track.