TARVOS
WEALTH

Investment Services

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Coming into a lump sum either from an inheritance, windfall or compensation claim, can bring with it the need to make a number of decisions. Whatever you want to do with it, spend it, invest it, give it away, you will benefit from taking advice from one of our independent financial planners.

We have expertise in all aspects of investments:

- Lump sums & regular saving
- Investing for income, capital growth or both
- Targeted strategies to meet specific future goals e.g. school fees funding
- Investing for grandchildren
- Short, medium and long timescales
- Tax efficient investments – income tax, capital gains tax and inheritance tax
- Drawdown strategies

We are independent which means that we can look across the whole investment universe and select the right solution for you. We are not tied to any single investment company or provider – our clients are our main priority and we put them front and centre of any decisions we make regarding recommendations.

We offer tailor made managed portfolio services uniquely available to clients of Tarvos Wealth as well as bespoke individual services. For more complex requirements and long term goal based strategies we can provide cashflow projections that can provide useful information when making decisions about how much to invest and the types of returns that may be needed to achieve a certain objective.

Our annual review service will ensure that your investments continue to remain suitable for your requirements. Regular reviews are one the most important aspects of financial planning.