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Best Boutique Wealth Management Firm - Texas & Recognized Leader in Retirement Planning – Texas



Investec Wealth Strategies is a family-owned and –operated advisory firm based in Houston, TX founded in 1984. Investec specializes in helping affluent families and individuals around the world accomplish their financial goals.

They do this by growing and protecting client portfolios and by providing holistic financial planning strategies. Clients gain reassurance and confidence by having their financial lives simplified and organized, with a personalized strategy in place to guide them through their retirement years.

Client interests are the top priority at Investec. “To provide clients with personalized service and address their concerns,” says John Goott, President and CEO of Investec, “we go through a rigorous screening process with prospects. We want to ensure that there is good chemistry between us and that we can add value as they pursue their goals.” Investec focuses on a select population, families and individuals with investable assets of at least \$1 million and is registered with the SEC as a Registered Investment Advisor.

“Our employees are an integral part of our service model,” states Daniel Goott, Executive Vice President of Investec Wealth Strategies. “When we add to our staff, we want to ensure first that prospective team members share our values—respect for clients, integrity, and dedication to service—and only then do we turn to knowledge, technical expertise, and other areas.”

Companies working in wealth management face a number of challenges and opportunities in the near future. According to Doug Garrison, Senior Vice President, “Retirees are having a difficult time in this era of low interest rates generating sufficient returns from the fixed income portion of their portfolios. Drawing down one’s savings makes market volatility more of a concern. We have to balance the risk of being too conservative with the recognition that we need growth in the portfolio to generate money for a lifetime. A principal concern of anyone in retirement is running out of money.”

Another challenge for financial advisors is the growing complexity of compliance—new rules and regulations continue to add to the workload and cost of independent firms like Investec.

Despite these challenges, Investec management is very optimistic that the firm will continue to grow and develop in 2016 and beyond. “We currently work in a rewarding business,” says John Goott, “where alongside the financial benefits, we have the opportunity to work with our clients and enrich their retirement years through sound planning and prudent investment management.”

