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Best Multidisciplinary Wealth Management Firm – Texas

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Investec is a boutique wealth management firm based in Houston, TX that has been serving affluent individuals and families for more than 30 years. We caught up with President and CEO John Goott, Executive Vice President Daniel Goott, and Senior Vice President Doug Garrison to learn more about the firm and investment opportunities it offers.

Investec is a family-owned and -operated advisory firm which specializes in helping affluent families and individuals around the world accomplish their financial goals. This is achieved by growing and protecting client portfolios and providing holistic financial planning strategies. John, Daniel and Doug talked us through the firm's client-focused mission and the steps it takes to achieve this.

"Investec's mission is to provide clients with confidence and reassurance by having their financial lives simplified and organized, built on a strong foundation of personalized strategy and service," states John.

"In order to achieve this, we go through a rigorous screening process with all 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. Because of this, we are able to develop and maintain close ties with clients over the course of their relationship with the firm," adds Daniel.

As a boutique firm with a client-focused approach, the firm works hard to ensure that their advisors and all staff offer the very highest standard of service to everyone they work with.

"Here at Investec, our team members are an integral part of our service model. When we add to our staff, we want to ensure first that prospective employees share our values--respect for clients, integrity, and dedication to service--and only then do we turn to knowledge, technical expertise, and other areas," explains Daniel.

"Overall, as a small, family-owned and -operated business, we have been fortunate to attract colleagues and associates who have blended in well, and remained with us over the years. We believe in treating our staff like family, emulating the way we treat our clients, with respect, honesty and genuine concern. This approach ensures that our staff members genuinely like to deal with our clients, helping us to make excellent service an integral part of our corporate DNA."

Holistic wealth management requires that Investec stay abreast of developments not only in the investment world, but also in areas such as taxation, estate planning, education funding, employee benefits, charitable giving, and risk analysis. John, Daniel and their diverse team spend many hours on training and research, gaining a strong insight into the market which they share with us.

Doug elaborates, "Within the wider investment market currently, 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 risks of being too conservative with the recognition that we need growth in the portfolio to generate money for a lifetime. A principle concern of anyone in retirement is running out of money during their later years of life."

Moving forward, Investec's ongoing focus will be on continuing to attract professional advisors so as to ensure the firm can provide the very highest standard of support to its clients.

John concludes, "Fundamentally, we live in an era in which many view the financial services industry with scepticism, and tend to focus on objective factors such as fees and performance numbers. Our most successful clients have tended instead to seek reassurance that we are looking after their financial affairs, that we will help them grow and preserve their wealth and that we will guide them in avoiding making any 'big mistakes.' Busy, affluent people will increasingly seek professional relationships which embody trust and responsiveness, and our challenge is to convey that value proposition in all that we do and say."