Sagicor

overview

About Sagicor Wealth Management

Sagicor Wealth Management involves a wholistic approach towards wealth accumulation and generation on an individual client basis through the establishment of bespoke portfolios to meet specified client objectives.

This revolving process is centered around the client and involves a multilayered structured process, which hinges on a comprehensive understanding of the client's total wealth, desired return objectives and risk tolerance. Once the gap analysis is completed, our wealth advisors and investment specialists establish the wealth plan, which serves at the road map to closing the gap.

Our robust assessment includes the determination of the client's ability and willingness to take the optimal level of risk, the client's current financial circumstances, any liquidity needs, tax considerations and client's stage in the investor lifecycle. The product of the thorough assessment is the establishment of a properly defined Investment Policy Statement, which guides the portfolio construction. Ongoing periodic reviews ensure that the investment process is up-to-date and serves to keep the investment portfolio on target to achieving the desired long-term results.

Customized Service Offering

Our Sagicor Wealth Management service is tailored to your individual financial needs. Making preparation today for future chapters of life that include tertiary education, evenpropertyownershipandevenretirementcanbesimplifiedwithSagicorWealthManagement. Our personalized service assist with addressing your financial wants, needs and objectives.

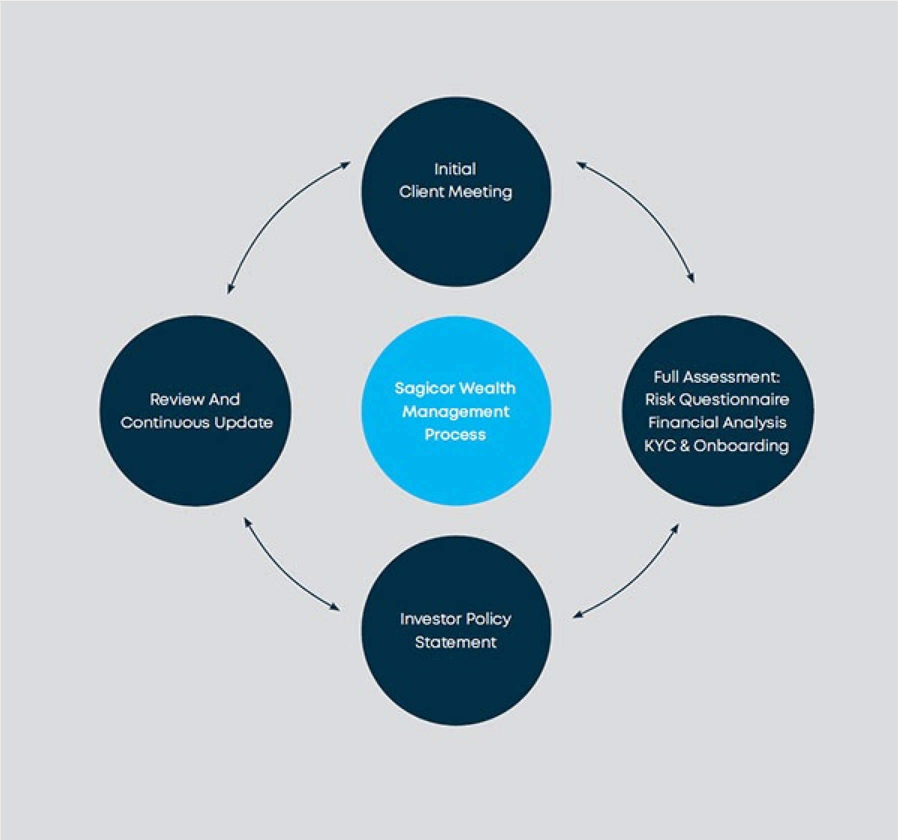
Our experienced team of strong, wealth managers, work with you as your fiduciary partner to ascertain your risk tolerance and objectives.

Our wide range of investment solutions will be attractive to both individual and institutional investors.

Want to know more? Contact Us Today!

Download our Individual or Corporate Application form

Our Process: Simple and Client Focused



Why Sagicor Wealth Management?

We are committed to providing customized portfolio management and risk assessment to you our clients by offering the highest standards of professionalism.

benefits

Financial security brings independence and a peace of mind. Well-informed and articulated decisions can help you reach your goals faster and with less costly mistakes or financial losses. Pursuing your goals towards your golden years in retirement should be achieved through wise financial decisions.

Investment opportunities are often missed due to lack of knowledge of their existence or poor timing. Tapping into these opportunities can result in rewards that can have exponential financial impacts. Our team will work with you to determine your level of risk tolerance, your goals and the timeline to achieve these goals.

related products

Investment Management

The services of our portfolio managers include personalized assistance for investment solutions, one-on-one meetings with clients and foundations for the Wealth Management divisions, as well as trustee, directorial, and staff sessions for corporate clients. We provide information regarding trends in the global markets and ensure clients are sensitized to the risks and rewards of investing.

Fixed Income Trading

If you have a fixed income instrument for trade or wish to acquire one, we can help you add existing government and/or corporate bonds to your portfolio.

Equity Trading

Trading on any Stock Exchange may seem like a daunting task for the new comer to the market or simply for the curious. It does not take a large sum of money to begin investing and our qualified brokers can guide you through the Bull and Bear markets to assist you in achieving your financial goals.