

## What do we offer you?

A personal team committed to helping you achieve your financial planning goals.



### Simon Jackson, Director

Key Financial Adviser for your personal and business requirements, providing ongoing advice and guidance supported by a genuine appreciation and understanding of your needs and aspirations.



### Helen Jeffrey, Director

Chartered Financial Planner providing individual and corporate advice. Also responsible for all the systems and controls required to operate as an organised, efficient and legally compliant business in our highly regulated industry.

## Who are we?

*"A recognised business providing high quality, fully independent advice to our clients delivered with the utmost integrity and professionalism."*

## Mortgages



### Mat Clamp Mortgage Adviser

Sources the most suitable and cost effective mortgage for your needs and provides advice and guidance throughout the process.



### Alex Hiorns Mortgage Administrator

Assists with all mortgage related queries and liaises directly with lenders to ensure your application is dealt with as efficiently as possible.



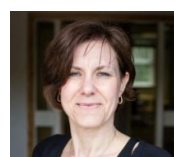
### Jane Wakeling Private Client Administrator

Assists with all administrative matters relating to your personal pension, investment and protection arrangements ensuring a prompt and efficient response.



### Hannah Savidge Auto Enrolment Specialist

Will guide you successfully through your corporate AE obligations drawing on experience gained since our first scheme staged in early 2013 when AE was in its infancy. She is also on hand to assist your employees with AE set up and administration queries



### Elaine Freeman Corporate Client Administrator

Helps to source the most competitive terms for your corporate benefits package including Group Life Assurance and Private Medical Insurance.

## Technical Paraplanning

### Neil Williams ACII, FPFs, IMC Chartered Financial Planner

Provides high level technical support on pension rules, investments, tax and trusts, helping you to fully understand your current financial position and future potential.

## Marketing

### Judith Burt

Ensures we keep you informed of topical financial issues via regular e-newsletters and e-updates and develops our extensive library of digital factsheets and website resources all of which are available to you free of charge.

**How we do it...** Intelliflo – the leading edge online back-office system from Intelligent Office. Full IT Back up and Support provided by GCC. Our regulatory compliance requirements are managed by independent, locally-based compliance consultants. Established relationship with major UK insurers spanning many years. Access to Defaqto independent research on all UK financial products. Operating from modern spacious offices in Stratford-upon-Avon with free parking and conveniently located close to Stratford Parkway Railway Station.

**Our Story.....** Established in 2009 ● Combined financial experience totalling **40+ years** ● Strong **client relationships spanning over 20 years** ● One of only 10% of UK Financial Advisers to achieve the Gold Standard Qualification of **Chartered Financial Planner Status** ● **Regulated and Authorised by the Financial Conduct Authority** ensuring ongoing professional development and adherence to industry standards ● **Fully Independent** with access to the entire market