

Key Personnel



Jennifer Storey CertPFS

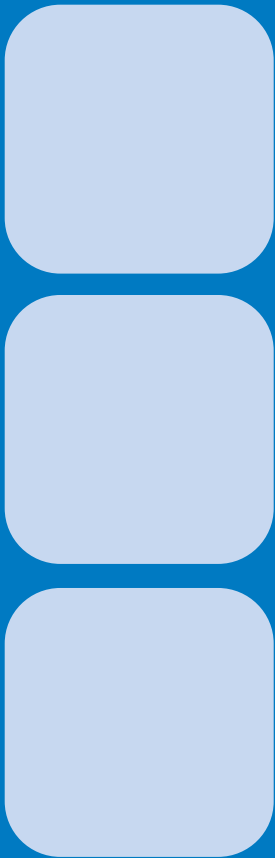
Jennifer attended university in Derby and acquired a BA Hons degree in Business Studies in 2001. Following graduation she commenced a trainee Independent Financial Adviser programme with Woolwich Independent Financial Advisory Services (a wholly owned subsidiary of Barclays). Following a comprehensive 18 month training programme she worked as an Independent Financial Adviser in the Cambridge area where she acquired valuable experience in the financial services market.

Jennifer then relocated to London and worked as a paraplanner for specialist IFA practices for five years. She has provided high level technical support and research services to a number of IFAs dealing with high net worth clients and compiling bespoke solutions to many complex financial planning scenarios.

She has attained the financial planning certificate and has also gained further advanced qualifications during her years in the industry. She continues to undertake professional qualifications to improve her knowledge and experience and considers this crucial to her professional development.

She has recently joined Whitehall Financial Independent as an IFA working alongside one of the director's, Charles Gillespie, supporting him in providing comprehensive and high quality advice to his clients.

Key Personnel



Services

■ Corporate Clients

- Corporate financial health check
- Executive & directors pension planning
- Business assurance protection
- Employee benefits
- Utilising pensions for commercial property purchase

■ Private Clients

- Financial health check
- Life assurance
- Retirement planning
- Tax efficient investments
- Inheritance tax planning
- Tax shelter investments
- Utilising pensions for commercial property purchase

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