

Key Personnel



Mark Oliver CertPFS

Mark has over 25 years experience in financial services and joined Whitehall Financial Independent in 2002 following successful careers with Lloyds Bank, Co-Op Bank, Hill Samuel and Legal & General. Previous roles have included Training & Competence Manager and Compliance Director with a large local IFA firm, providing him with a wealth of experience and technical knowledge.

Qualified with the Chartered Insurance Institute Financial Planning Certificate, Mark is also one of a limited number of advisers to hold the pensions specialist G60 qualification.

Mark specialises in pre and post retirement planning including transferring of pensions and the use of pensions as business tools. He also offers advice on the complex areas of inheritance tax, believing that early and careful planning can help reduce large tax demands.

In addition to these specialist areas Mark provides a total wealth management service to both private and corporate clients and prides himself on his understanding of the market and the needs of 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 investment

■ Private Clients

- Financial health check
- Life assurance
- Retirement planning
- Pension transfers
- Tax efficient investments
- Inheritance tax planning
- Tax shelter investments
- Mortgages
- Utilising pensions for commercial property investment

Your home may be repossessed if you do not keep up repayments on your mortgage.

There will be a fee for mortgage advice. The precise amount will depend upon your circumstances but we estimate it will be 0.5% of the loan amount, example: on a £100,000 advance, the fee payable would be £500. You have the option to pay us a fee and receive any commission which are paid by the lender. If you chose this option we estimate the fee will be £1000.

Whitehall Financial Independent Limited is authorised and regulated by the Financial Services Authority.

The Financial Services Authority does not regulate taxation and trust advice.

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