

Key Personnel



Jez Christopher CertPFS

Jez joined the Prudential as a Financial Consultant in 1989 and became one of the region's top Consultants in a very short period of time specialising in the investment and pension markets whilst providing a high level of personal service to his clients.

In 1994 Jez became Area Sales Manager of the Lincolnshire region, building a focused advisory team of Consultants, winning awards for quality advice, business levels and professional service standards. December 1999 saw Jez leave Prudential to establish a new Independent Financial Adviser firm, Summit Financial Solutions, which quickly grew to a major IFA company in the Midlands & Lincolnshire with over 40 Independent Financial Advisers.

In May 2004 Jez left Summit Financial Solutions to set up a business practice with Whitehall Financial Independent Ltd in Lincoln to provide the ability to enhance and manage a continually expanding personal and corporate client base.

Jez has attained the Chartered Insurance Institute Financial Planning Certificate in addition to the Institute of Financial Services Certificate in Mortgage Advice and Practice.



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His far-reaching experience has led him to advise in the more complex areas of financial planning both in Personal and Corporate markets. This experience is further underpinned with Jez not being tied to any one company and adopting a truly independent strategy so being able to advise from the whole market place.

Services

■ Corporate Clients

- Corporate financial health check
- Business assurance protection
- Employee benefits
- Commercial property investment
- Commercial financing

■ Private Clients

- Financial health check
- Life assurance
- Retirement planning
- Tax efficient investments
- Inheritance tax planning
- Tax shelter investments
- Mortgages

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. We also have a no fee option available.

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

The Financial Services Authority does not regulate taxation and trust advice and certain types of commercial mortgages.

The Financial Services Authority does not regulate taxation and trust advice or some aspects of commercial mortgages and employees benefits.

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