



## Lincoln

# Our Offices

The Lincoln office of Whitehall Financial Independent Limited was established when Jez Christopher, Keith Davidson and Lorraine Coaton joined the Sheffield based Whitehall Group in May 2004.

This partnership brought together the complimentary skills and knowledge of Jez, Keith and Lorraine with an impressive team of additional financial specialists to offer an unrivalled service to both corporate and private clients.

WFI has seen significant growth over the past years and the company has expanded its operation with the introduction of a satellite branch in Derby in addition to Lincoln. This expansion is set to continue as WFI aim to become a well respected and recognised regional IFA firm.

The Sheffield head office provides the centralised administration support for the WFI Group, including branch offices and the company's various divisions such as Whitehall Mortgage Services.

### Location

Prestigious offices conveniently located in Lincoln provide a local presence and a base to provide a fast efficient service to our growing and already established client base.



# Our Offices

## Services

Offering truly tax efficient solutions to clients with widely differing needs, WFI delivers a total wealth management service incorporating virtually every facet of finance and investment.

### ■ Corporate Clients

- Use of profits from the business
- Property purchase
- Corporation tax mitigation
- Planning for the sale of business and or retirement
- Arranging borrowing
- Planning for the unexpected, namely death or illness
- Employee pension and benefit packages

### ■ Private Clients

- Reducing income tax payable
- Mitigating capital gains tax
- Funding for retirement
- Tax efficient investment for capital growth or income
- Protection for families
- Protecting estates against inheritance tax
- Provision and planning for long term care
- Ensuring existing investments match needs and attitude to risk

## Training & Development

To ensure the highest possible standards, every adviser within WFI has their new business submissions checked regularly, they also undergo frequent one-to-one meetings with the company Training and Competence Officer to review any potential areas of development.

A designated member of the administration team is responsible for training our support personnel on our computerised office system and administration procedures, whilst a qualified adviser provides training on our business sourcing systems.

Our experienced support team brings a wealth of knowledge gained through many diverse sectors of the financial services industry. We encourage and assist each member of the team to study for industry qualifications and a number of Certificate of Financial Planning (CFP) qualified staff and advisers are currently studying towards the Advanced Diploma in Financial Planning or other industry related advanced qualifications.

## Compliance Control

Whitehall Financial Independent Limited is authorised and regulated by the Financial Services Authority (FSA). Our aim is to provide the highest levels of service and best advice to our clients and to that end we are members of Bankhall Investment Associates who assist us with our compliance control issues and provide ongoing support in this vital area. This support and the close supervision within our company helps us to provide advice to clients in line with FSA guidelines.

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

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