

Key Personnel



Paul Archer DipPFS
Director

Paul has over 15 years experience in financial services since graduating from Sheffield Hallam University with a Masters degree in Mechanical Engineering.

Paul started his career as a financial consultant at Laurentian Milldon, Sheffield in 1992 and developed an impressive client bank and product portfolio, advising on a wide range of financial issues.

He successfully attained the Chartered Insurance Institute (CII) Financial Planning Certificate in 1996, the pension paper of the Advanced Financial Planning Certificate in 2000 and has taken further professional exams to qualify as Diploma member of the Personal Finance Society. He is currently working to attain chartered status demonstrating his commitment to provide enhanced advice to his clients.

Paul joined Whitehall Financial Independent soon after the company was established and has built a successful and well-established practice offering bespoke financial planning solutions to corporate and personal clients. In 2008, Paul was appointed as a director of Whitehall Financial Independent Ltd which is one of South Yorkshire's largest firms of independent financial advisers.

Paul's outside interests include coaching at Sheffield United Football Academy and he holds the UEFA 'A' Coaching Licence.



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
- Tax efficient investments
- Inheritance tax planning
- Tax shelter investments
- Retirement planning
- Pension transfers
- Life assurance
- Mortgages
- Utilising pensions for commercial property purchase
- Long term care

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 choose this option we estimate that the fee will be £1,000.

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

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

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