

Key Personnel



Lee Thompson CertPFS

Lee has almost ten years experience in financial services since graduating from Sheffield University in 1996. After obtaining his degree in Accountancy & Financial Management, Lee began his career in an administrative capacity with Norwich Union then became heavily involved in staff training and subsequently moved into a supervisory role. Lee joined Scottish Equitable in 2000 to broaden his range of expertise and obtained his Chartered Insurance Institute Financial Planning Certificate in 2002.

In 2004 Lee moved to AFS Limited where he provided financial services to clients of four firms of Chartered Accountants. He left AFS to join Whitehall Financial Independent where he offers a wide range of financial advice on areas including pensions, retirement options, offshore and onshore investment, inheritance tax planning, corporate and personal protection and employee benefits to both corporate and private clients.

As well as the Chartered Insurance Institute Financial Planning Certificate Lee is also one of the few advisers to hold the pensions specialist G60 qualification and follow up CF9 pensions simplification qualification. Lee has recently passed his CF6 qualification, which allows him to offer mortgage advice.



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Services

■ Corporate Clients

- Corporate financial health check
- Executive & directors pension planning
- Business assurance protection
- Employee benefits
- Group personal pensions
- Commercial property investment

■ Private Clients

- Financial health check
- Personal pensions and pension transfers
- Retirement options
- Life assurance
- Inheritance tax planning
- Tax efficient investments
- Mortgages
- 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. 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.

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