

# Key Personnel



Mark Jones DipPFS

After graduating from University of Central England with a degree in Finance in 2002, Mark has looked to progress his career in Financial Services and obtain as much experience and knowledge as possible.

Mark started his career with HSBC Bank as a multi-tied adviser working in the South Yorkshire area advising on mortgages, investments and protection, whilst furthering his qualifications by passing both the Institute of Financial Services Certificate in Financial Planning and Certificate in Mortgage Planning.

To further his knowledge and career Mark took a position with Nationwide Independent Financial Services Ltd as an Independent Financial Adviser offering tailored advice to clients in relation to their Trust, Inheritance Tax, Pensions and Investment needs around the Yorkshire and Greater Manchester area.

Whilst with Nationwide IFS, Mark has built relationships with local accountants and solicitors, along with further advancing his qualifications by passing the Chartered Insurance Institutes Diploma in Financial Services by specialising in tax and trust planning.

Mark left Nationwide IFS Ltd to join Whitehall Financial Independent Ltd to help deliver further bespoke and tailored financial services to our clients with all aspects of their planning requirements.



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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.

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