

Key Personnel

Martin Lomax

Martin joined the Prudential in 1989 and was initially responsible for maintaining and servicing an existing client bank, providing guidance and financial planning solutions.

He was rapidly promoted to Management Consultant then took over the reigns as Sales Manager where he helped to train and develop a highly professional operation.

2000 saw Martin leave the Prudential to establish his own Independent Financial Adviser firm, giving him invaluable experience of running a business and building a comprehensive client and product portfolio.

Martin brought his knowledge of the business to Whitehall Financial Independent when he joined the team in 2004. Martin compares his service to that of a General Practitioner – arranging a consultation, providing a diagnosis and a solution but offering specialist advice where required. He prides himself on understanding the needs of his clients and presenting solutions in a clear and easy to understand manner together with the highest levels of service.

Martin holds the Chartered Insurance Institute Financial Planning Certificate.



Key Personnel

Services

■ Corporate Clients

Corporate financial health check
Executive & directors pension planning
Business assurance protection
Employee benefits

■ Private Clients

Financial health check
Life assurance
Retirement planning
Tax efficient investments
Inheritance tax planning
Tax shelter investments
Mortgages
Long term care planning

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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