

# Key Personnel



## Charles Gillespie BSc FPFS Chartered Financial Planner

Charles commenced his financial services career when he joined Laurentian Milldon in 1989 after graduating from University with a joint honours degree in accountancy and data processing. Within years he had risen to become one of the company's most qualified advisers and specialised in the more complex areas of financial advice providing high net worth clients and directors of owner managed businesses with bespoke financial planning solutions.

Charles has attained the highest accolade in financial services and is a Fellow of the Personal Finance Society as well as a Chartered Financial Planner. The Personal Finance Society is the professional body for financial advisers in the UK. Charles was awarded Bankhall IFA planner of the year 2003 from a field of over 7000 independent financial advisers.

Charles founded Whitehall Financial Independent in 1996 and has spearheaded and developed a flourishing operation providing his clients with a comprehensive financial advisory service.

Whitehall Financial Independent merged with Rendall & Co in 2002 and together with his Co-Director Mark Rendall, Charles has built the company into a large regional firm of independent financial advisers.



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## Services

### ■ Corporate Clients

- Corporate financial health check
- Executive & directors pension planning
- Business assurance protection
- Employee benefits
- Utilising pensions for commercial property investment

### ■ Private Clients

- Financial health check
- Life assurance
- Retirement planning
- Pension transfers
- 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. 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 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.

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