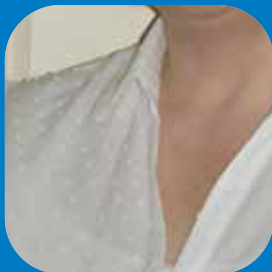


Key Personnel



Lynda Donaldson CertPFS

Lynda has been working in the financial services industry since the early 1980's. She has been a Building Society Assistant Branch Manager, a Broker Consultant for Royal Life and a Consultant for The Royal Bank of Scotland. While in this role she achieved recognition for her outstanding contribution in 1995/1996 and was second in the country in 1996.

Lynda was proud to be selected as a Magistrate for the Rotherham Branch in 1998 and soon after was appointed as Treasurer / Board of Trustees for Age Concern (Rotherham), she also sits on the Audit Committee of the Rotherham and Barnsley Chamber of Commerce and is an active member of the Chamber.

Lynda left the Royal Bank of Scotland in 1999 to practice as a self-employed independent adviser with Inter Alliance and moved to The Millfield Partnership in 2002. During her time at The Millfield Partnership she was 'Highly Commended' at The Health Insurance Awards London in 2003. This was for Best Newcomer – Long Term Care - and the judges commented 'Lynda displays enormous potential for the future'.

She is a member of the Personal Finance Society, a Conservative Councillor for Rotherham Town Council and recently successful prospective parliamentary candidate.

Lynda has a wealth of experience in all aspects of financial planning both with individuals, high net worth and corporate clients. She specialises in tax planning, tax mitigation schemes, estate planning and wealth preservation and also works closely with a large firm of solicitors. Lynda has a client base in London and Yorkshire and provides a flexible and friendly service.



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

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.

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