



Mark Tennant CertPFS

Key Personnel

Mark has over 15 years experience in financial services following a brief period in engineering after studying Mechanical and Manufacturing Engineering at Sheffield Hallam University.

Mark joined Sun Life in 1994 as a financial consultant advising clients on a wide range of financial issues before becoming an Independent Financial Adviser in 1997. In addition to providing his private and corporate clients with holistic financial planning, Mark also specialises in school fees planning and employee benefit programmes in consultation with corporate clients.

Professionally Mark ensures that his private and corporate clients have the optimum solutions for their individually unique needs be it wealth management, tax or business planning. He holds the Chartered Insurance Institute (CII) Certificate in Financial Planning and is currently midway towards completing the CII Diploma in Financial Planning.

Away from the office Mark enjoys spending time cycling and sailing with his wife and three young children and also playing five a side football.



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Key Personnel



Services

■ Corporate Clients

- Corporate financial health check
- Executive and directors pension planning
- Business assurance protection
- Employee benefits
- Group personal pensions

■ Private Clients

- Mortgages
- Financial health check
- Life assurance
- Pre and post retirement planning
- Tax efficient investments
- Inheritance tax planning
- Tax shelter investments
- 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 that the fee will be £1,000.

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