



Colin Roberts CertPFS CeMAP

Key Personnel

Colin joined the financial services industry in 1994 as a tied financial adviser for Wesleyan Assurance Society, the financial services specialist for the medical, dental and teaching professions. He became the top producing adviser in the Nottingham office in his first year of employment.

In 2000, Colin became an Independent Financial Adviser and built a successful practice with a large private client bank advising on a wide range of financial issues and offering bespoke financial solutions to his clients.

Colin then went onto work in bank assurance, firstly with Lloyds TSB and then Royal Bank of Scotland providing financial advice to both the banks high net worth and corporate clients. He joined Whitehall Financial Independent in 2007 and is based at the expanding Derby office where he assists clients throughout the Midlands region.

Colin's experience enables him to offer a comprehensive range of financial advice and he prides himself on presenting solutions in a clear and easy to understand manner together with the highest levels of service.

In his spare time Colin enjoys spending time with his young family and playing five a side football once a week, a passion for the past 20 years.



Key Personnel



Services

■ Corporate Clients

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

■ Private Clients

- Financial health check
- Life assurance
- Retirement planning
- Tax efficient investments
- Inheritance tax planning
- Mortgages

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.

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The Financial Services Authority does not regulate taxation and trust advice or some aspects of commercial mortgages and employees benefits.

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