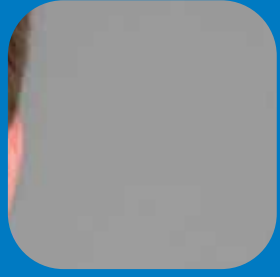


Key Personnel



Rob Mitchell BSc FPFS
Investment Director
Chartered Financial Planner

Having commenced his career in 1986, Rob enjoyed a variety of roles with Norwich Union and gained an excellent understanding of the financial services industry. Following relocation from Norwich to Sheffield in 1990, he became an adviser with Yorkshire Bank Financial Services. After a highly successful time there he moved to the Royal Bank of Scotland and quickly became one of their most highly regarded consultants specialising in investments and corporate financial planning.

In 2000 Rob left the bank to become a Senior Financial Planner with a leading Sheffield firm of Independent Financial Consultants. He was responsible for managing their Investment Department and providing a tailored and bespoke financial advisory service to their high net worth and corporate clients.

Rob joined the Whitehall team in 2006 to help deliver the highest possible standard of advice to our clients. He deals with all aspects of personal and corporate financial planning, providing a total wealth management service.

Rob is one of the most qualified financial planners in the UK, having attained the title of a Chartered Financial Planner and a Fellow of the Personal Finance Society. There are approximately 300 advisers who have attained this level of qualifications, one of whom is Charles Gillespie, a Director at Whitehall Financial Independent. This is seen as the highest possible achievement in the industry. Rob has been instrumental in implementing Whitehall Financial Independent investment management process and was appointed Investment Director in July 2009.



Key Personnel



Services

■ Corporate Clients

- Corporate financial health check
- Executive & directors pension planning
- Business assurance protection
- Employee benefits
- 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
- Commercial property investment

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 or some aspects of commercial mortgages and employees benefits.

Whitehall Financial Independent Limited
Whitehall House
2 Queens Road
Sheffield S2 4DG

Tel 0114 2758882 Fax 0114 2758001
E-mail robm@wfiltd.co.uk
Website www.whitehallfinancial.co.uk