

# Key Personnel



Claire Winchurch CertPFS

Claire first joined the financial services Industry in 1998 working for Pearl Assurance as a Marketing Associate. However, she soon decided this was not the career path she wanted and preferred to work in an advisory role and took the position of General Insurance Consultant. It was during this time she attained the Financial Planning Certificate and Certificate in Mortgage Advice and Practice and was soon promoted to Financial Adviser. She then moved to Royal London as a Financial Consultant, working with a varied client bank and building up new client referrals.

Claire has also worked extensively in the Estate Agency environment, gaining invaluable insight into the house buying process and has substantial experience in the Buy to Let arena, with many clients who run large property portfolios. She has also attained the Certificate in Regulated Equity Release and is one of only two advisers at Whitehall Financial Independent (WFI) in Sheffield qualified to advise on this type of scheme.

At WFI, Claire's role encompasses Group Pensions Manager and Mortgage Manager, as well as giving holistic financial planning advice to both new and existing customers. She is continuing to undertake professional qualifications to improve her knowledge and her professional development.



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## Services

### ■ Corporate Clients

- Employee benefits
- Group personal pensions

### ■ Private Clients

- Financial health check
- Personal pensions and pension transfers
- Retirement options
- Life assurance
- Inheritance tax planning
- Tax efficient investments
- Mortgages
- Commercial property investment
- Equity Release

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 and some aspects of buy to let mortgages.

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