

Key Personnel



Keith Davidson CertPFS

Keith has over 23 years experience within the financial services industry, initially as an insurance underwriter before joining Liverpool Victoria in 1986. Within a short time he had risen to become their leading Financial Consultant and was later promoted to Area Manager in Nottingham.

Keith joined the Prudential in 1997 as a Sales Manager specialising in investments and retirement planning before moving to the independent sector in April 2000. He has attained the Chartered Insurance Institute Financial Planning Certificate along with the Mortgage Advice Qualification in mortgage planning.

May 2004 saw Keith set up a business practice with Whitehall Financial Independent Ltd in Lincoln, bringing with him a comprehensive client bank and a valuable network of contacts.

Keith's extensive experience has led him to specialise in public superannuation pension schemes, inheritance tax and investments.



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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
- 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 and certain types of commercial mortgages.

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