

Key Personnel



Kevin Holleron DipPFS CII(MP)

Having spent his youth on the books at Hull City Football Club, Kevin was forced to re-think his career following a knee injury and so in 1995 he became a Financial Consultant with Prudential. He quickly rose through the ranks gaining his Financial Planning Certificate in 1996. Kevin then progressed to HSBC Bank as the Corporate Financial Planning Manager, where he developed his passion for advising clients with their business financial planning aspirations.

In 2005, Kevin joined The Wesleyan Assurance Society as one of their specialist Financial Consultants providing financial planning to the Dental profession and achieved the Elite award in 2006 and 2007 for finishing 3rd in the UK and Ireland for business production.

He was amongst the first 10% of IFAs in the UK to hold the Diploma qualification including advanced qualifications in tax, trusts and investment planning.

Kevin went on to form IFA 4 Dentists, which later merged with Derwent Bell in July 2009 and subsequently following the takeover of Derwent Bell by Whitehall Financial Independent Ltd (WFI) soon after, he is now tasked with developing the Healthcare division and is excited about the prospect of enhancing his services still further with the support and back up of the team at WFI.



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Kevin puts his success down to truly taking the time to understand his clients' needs, developing long term trusted relationships which in turn helps clients to create, protect and preserve their wealth.

In his spare time Kevin enjoys playing with his young son Oscar.

Services

■ Corporate Clients

- Corporate financial health check
- Executive and directors pension planning
- Business assurance protection
- Employee benefits
- Group personal pensions
- Utilising pensions for commercial property purchase

■ 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
- Utilising pensions for commercial property purchase

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.

Whitehall Financial Independent Limited is authorised and regulated by the Financial Services Authority.

The Financial Services Authority does not regulate taxation, trust advice and employee benefits.

The value of some investments can go down as well as up and you may not get back the full amount invested.

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