Our Offices

Sheffield

The merger in March 2002 between Rendall & Co and Whitehall Financial Independent Limited (WFI) brought together the complimentary skills and specialities of two well-established local companies.

WFI has seen significant growth since this merger and the company has expanded its operation with the introduction of satellite branches in Derby and Lincoln. This expansion is set to continue as WFI aim to become a well respected and recognised regional IFA firm.

The organisation has established thriving joint venture companies with three of the regions leading firms of Chartered Accountants, offering a full financial planning service to their new and existing clients.

The Sheffield head office provides the centralised administration support for the WFI Group, including branch offices and the company's divisions such as Whitehall Mortgage Services.

Location

Based in prestigious city centre premises, Whitehall Financial Independent's head office is conveniently placed and easily accessible from major motorway routes.

whitehall financial independent ltd

Our Offices

Services

Offering truly tax efficient solutions to clients with widely differing needs, WFI delivers a total wealth management service incorporating virtually every facet of finance and investment.

Corporate Clients

- Use of profits from the business
- Property purchase
- Corporation tax mitigation
- Planning for the sale of business and or retirement
- Arranging borrowing
- Planning for the unexpected, namely death or illness
- Employee pension and benefit packages

Private Clients

- Reducing income tax payable
- Mitigating capital gains tax
- Funding for retirement
- Tax efficient investment for capital growth or income
- Protection for families
- Protecting estates against inheritance tax
- Provision and planning for long term care
- Ensuring existing investments match needs and attitude to risk

Training & Development

To ensure the highest possible standards, every adviser within WFI has their new business submissions checked regularly, they also undergo frequent one-to-one meetings with the company Training and Competence Officer to review any potential areas of development.

A designated member of the administration team is responsible for training our support personnel on our computerised office system and administration procedures, whilst a qualified adviser provides training on our business sourcing systems.

Our experienced support team brings a wealth of knowledge gained through many diverse sectors of the financial services industry. We encourage and assist each member of the team to study for industry qualifications and a number of Certificate of Financial Planning (CFP) qualified staff and advisers are currently studying towards the Advanced Diploma in Financial Planning or other industry related advanced qualifications.

Compliance Control

Whitehall Financial Independent Limited is authorised and regulated by the Financial Services Authority (FSA). Our aim is to provide the highest levels of service and best advice to our clients and to that end we are members of Bankhall Investment Associates who assist us with our compliance control issues and provide ongoing support in this vital area. This support and the close supervision within our company ensure that the advice given to clients is at all times fully in line with the FSA guidelines.

The Financial Services Authority does not regulate taxation and trust advice and certain types of commercial mortgages.

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

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