



PLATINUM

financial



Name: Alan Tolson
Role: Financial Consultant
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Specialism: Retirement Planning and Personal Wealth Management for teachers.

Overview:

Alan has over 30 years' experience within Financial Services, in roles ranging from Administration Manager to Compliance Manager for a major financial institution. For the last twelve years he has been providing independent financial advice and currently spends most his time dealing with public sector clients providing advice on their retirement planning and personal wealth management.

Experience:

- Achieved PFS Diploma Level, CII
- Is a member of the Personal Finance Society & Chartered Insurance Institute
- Experience in core advice areas, as well as specialism in Pensions & Investments
- Offers specialist advice to Teaching professionals and teachers' pension scheme members
- Regularly presents educational workshops to number of corporate clients and their employees/members

Specific Skills:

- Pre and post retirement planning
- Individual Wealth Management
- Inheritance tax planning
- Protection planning

“Platinum Financial offer a friendly and personal service that combines professional independent advice, with a no-nonsense dialogue. I felt enlightened after my meeting with Alan and I wished I had visited him sooner!”

(A. Feeney)



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Your Adviser

Pensions. Protection. Mortgages. Investments.