

clayden associates

independent financial advisers

Your Planner's Profile

Name: Dan Clayden
Role: Director/Chartered Financial Planner
Contact: daniel@claydenassociates.co.uk
Mobile: 07785 976323
Other Contacts: www.claydenassociates.co.uk



Overview

Dan has more than 18 years of experience in Financial Services, in roles ranging from company director to training advisers and advising clients. Dan has:

- Experience in core advice areas, as well as specialism in Investment Advice, Estate Planning and Wealth Management
- Achieved Chartered Financial Planner Status
- Is a Fellow of the Personal Finance Society and holds the PFS Advanced Diploma
- Has a network of specially selected specialists to support your advice needs
- Works with private clients, corporate clients and SME's, lawyers, accountants and affinity groups
- Has built a solid network of clients as a result of enquiries and referrals made by individuals, professionals and business leaders
- Responsible for developing professional connections and increasing media awareness in the Plymouth & Cornwall region as part of his role as 'Chartered Champion' for the PFS
- Winner of best small/sole trader IFA category in unbiased.co.uk's 'Media IFA of the Year awards' 2010
- Is an approved trainer for the Chartered Insurance Institute
- Married for 15 years and has 4 children

Specific Skills:

- Investment and pre-retirement planning
- Near and post retirement planning
- Inheritance tax and estate planning
- Personal taxation planning
- Holistic financial planning

"Daniel understood what was important to us, which helped him to advise us on how to get the best out of our money. It was clear that he had carefully considered how different scenarios would affect us financially and helped us to put in place plans that were suitable to cover our needs."

Clayden Associates, Unit 9, The Business Centre, 33 Chapel Street, Buckfastleigh, Devon TQ11 0AB
tel: (01364) 643003 fax: (01364) 644297 website: www.claydenassociates.co.uk

'Clayden Associates' is a trading name of Clayden Associates Limited. Clayden Associates Limited are registered in England & Wales under number 5396590. Registered Office as above. Clayden Associates is authorised and regulated by the Financial Conduct Authority. Tax advice, estate planning and will writing are not regulated by the Financial Conduct Authority.