

"Your advice has been the best and most thorough financial advice that I have received to date"



Graham Day Independent Financial Adviser

Graham takes an alternative approach to financial planning. This is perhaps better expressed as 'Lifestyle Planning', using creative solutions to help you achieve your goals and ensure you are financially well organised.

Graham will help you understand *what you have got, how it is doing* and help you get or remain on track for where you want to be. He will also keep you advised about *what you should be doing next*.

Above all, Graham will refreshingly tell you the truth about money!



About Graham:

Graham joined the industry as an adviser in 1986 and has continued to develop his knowledge more recently achieving advanced qualifications in retirement planning, investment portfolio management, taxation and trusts. He also holds a Diploma in Performance Coaching in business. Prior to this, Graham worked as a Regional Manager for a major International Financial Services company.

Whilst Graham has a diverse range of individual and corporate clients, he limits the number of clients he looks after at any one time to ensure he can maintain beneficial long-term relationships. He has a friendly and helpful approach to financial planning, whilst still telling the truth about money.

Graham is married with two sons and lives in Epsom. He enjoys travelling, golf, trekking and Grand Prix motorsport.

Advice Given on:

- Pensions
- Investments
- Inheritance Tax Planning
- Trust Planning
- Corporate/individual financial planning
- Key person Protection
- Post retirement planning
- Estate planning and inheritance tax mitigation
- Private Medical Insurance
- Wealth Management
- Life assurance and family protection

Qualifications:

- AIPF & DipPFS
- Qualifications
 - G60 (Pensions)
 - G10 (Tax & Trust)
 - AF4 (Investment Planning)
 - SV1 (Savings + Investments)
 - J01 (Personal Taxation)
 - J04 (Pension Funding Options)
 - J05 (Pension income options)
 - J06 (Investment Principles, Markets & Environment)

Territory: Southeast

"trusted benefits advice"