

“Having reviewed the proposals last week we all agreed that you had done an excellent job in highlighting the best possibilities and in negotiating a first class fee package. We want you to be aware of how grateful we are of your work”



Richard Bailey Independent Financial Adviser

Richard has worked in the financial services industry for 30 years and is a fully qualified Independent Financial Adviser.

Although qualified to advise on numerous subjects, Richard specialises in the creation and management of investment portfolios. He has many years of experience and prides himself on the professional service he provides.



About Richard:

Richard began his career in 1978 working for Natwest where he worked for 20 years. During this time he gained valuable knowledge of the financial services industry, which led him to Bates Investments Services Ltd which became Honister Partners in 2008.

Richard has been affiliated with Opal Benefits since July 2007 but has worked with Ben and Peter for several years prior to the launch of the brand.

Richards existing client base is truly global stretching from California all the way to Dubai. Much of his work comes from referrals which is a testament to his thoroughness and dedication.

He lives with his wife and enjoys racing motorbikes, fine wine and exotic gardening in a cool climate.

Advice Given on:

- Investments
- Pensions

Specialist in:

- Creation + Management of Investment Portfolios.

Qualifications:

- FPC 1, 2 + 3 (Financial Planning Certificate)
- SV1 - Savings + Investments advanced
- K10 - Retirement Options Advanced
- Bates High Risk Investment Licence - VCT, EIS, SIPP, SSAS

Territory: Nationwide

“trusted benefits advice”