

# Introducing Mogers Drewett Financial Planning

**At Mogers Drewett, we offer more than just expert legal advice. We have an in-house team of Financial Planners, who work closely with our legal teams allowing us to cater for all your financial & legal requirements.**

Our specialist team of Financial Planners at Mogers Drewett Financial Planners (MDFP) provide a full range of independent financial advice for both individuals and companies, including:

- Investment Strategy and Portfolio Management
- Retirement Planning
- Estate Planning – Ensuring you can pass your estate to your beneficiaries in a tax efficient manner
- Trust investments
- Protecting the future of your business
- Care Fees Planning
- Financial Planning on divorce and separation
- Recipients of compensation awards and personal injury settlements
- Protecting your lifestyle and standard of living
- Equity Release

For further information, or to arrange a no obligation appointment, contact us today by telephone on **01225 308333** or email **[financialplanning@mogersdrewett.com](mailto:financialplanning@mogersdrewett.com)**

# Meet the Financial Planning team

## DANIEL GORNALL



**With over fifteen years of industry experience, Chartered Financial Planner Daniel Gornall specialises in providing Independent Financial Advice:**

- To those going through divorce or separation – being one of only approximately 35 other financial professionals in the UK to hold the Resolution Specialist Accreditation as a financial expert in divorce work.
- For individuals and families to help them plan to achieve their desired future lifestyles

### Qualifications

- Fellow of the Personal Finance Society
- Chartered Financial Planner
- Resolution Accredited Specialist
- Advanced Diploma in Financial Planning
- Certificate in Equity Release
- Certificate in Mortgage Advice
- Certificate in Investment Operations

## JON STEVENS



**Jon is a Chartered Financial Planner with more than 25 years' experience in the financial services profession and specialises in financial planning and investment strategies for:**

- People in later life and their families
- Personal injury claimants and their legal advisers
- Anyone wishing to make financial provision for someone with Special Needs
- Deputies Attorneys & Trustees

### Qualifications

- Fellow of the Personal Finance Society
- Chartered Financial Planner
- Member of the Society of Later Life Advisers (SOLLA)
- Advanced Diploma in Financial Planning
- Certificate in Discretionary Investment Management
- Certificate in Financial Planning and Lifetime Mortgage Activities
- Certificate in Financial Planning and Long-Term Care Insurance
- Affiliate of the Society of Trust and Estate Practitioners (STEP)

## SEAN McCABE



**Chartered Financial Adviser, Sean McCabe started his career in finance in 1988 and specialises in financial planning for:**

- Later Life – including funding for care home
- Retirement & Pension Planning
- Investment after inheritance
- Trust & Trustee Investments
- Using your property to support you in retirement

Sean is also a Dementia Friend and was a founder member of the Frome Dementia Action Alliance which is looking to make his hometown of Frome a Dementia Friendly Community

### Qualifications

- Chartered Financial Planner
- Member of the Society of Later Life Advisers (SOLLA)
- Advanced Diploma in Financial Planning
- Pension Transfer Specialist
- Certificate in Equity Release
- Certificate in Mortgage Advice

## STUART DOUGHTY



**Founding Director Stuart Doughty has worked in the finance industry since 1985 having gained blue chip experience with Barclays, Aviva, and Eversheds prior to moving to Cavendish Grant (Bath) in 2001. Stuart specialises on financial planning for:**

- Business owners – including succession planning
- Private client investment and pension planning
- Recipients of compensation awards and personal injury settlements