Ken Hall   APFS, Certs (CII (MP & ER)

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Chartered

Profile

Ken is a Chartered Financial Planner and Certified Financial Planner who's love of personal tax combined with many years of technical experience and professional qualifications in advanced pension work, means he can offer real financial direction and peace of mind to clients, particularly those making retirement decisions or in retirement already. Ken focuses on preserving his client's wealth now and for the next generation. His emphasis on practical help as well as financial planning means his clients not only have clarity on how much they have, what they can spend and what might be passed onto their loved ones, but also helps them feel financially well-organised.

Qualifications & Affiliations

Ken combines his practical experience with professional qualifications. He continues to undertake professional development.

- **Certified Financial Planner - CFP ™ (obtained 2013) -** with the Chartered Institute of Securities & Investment (CISI), formerly the Institute of Financial Planning (IFP).
- **Chartered Financial Planner (obtained 2013)** and Associate of the Personal Finance Society with the Chartered Insurance Institute (CII).
- **STEP Certificate for Financial Services (obtained 2010)** (Trusts and Estate Planning) with the Society of Trust & Estate Practitioners.
- Other previous CII qualifications include Pension Options (J04 & J05), & Long term care (CF8), pension simplification (CF9), Certificate in Financial Planning and Mortgage Advice Qualification (MAQ)

Current position

The Aspire Partnership LLP **Jan 2010 – Present**
Associate Partner and Chartered Financial Planner

The Aspire Partnership was created to offer a financial planning service which helps people make the most of the opportunities that they come across. Aspire's philosophy is to provide clarity, transparency and a client focussed approach therefore client's should feel they are dealing with a firm that truly has their interests at heart and can help them to meet their own personal goals and aspirations.

Aspire deal predominantly with the financial needs of individuals, small business owners and those who look after other peoples' money (Trustees, Attorneys & Deputies). Aspire offers tailored services to meet the needs of these different client groups.

Ken's skills include; technical analysis & research, personal taxation excellent client empathy.

Responsibilities:
- Chartered Financial Planner – providing suitable financial advice to retail clients
- Associate Partner – promoting and supporting the business

Client testimonials are available on request

Work history

Bluefin Financial Advice – Bristol **November 2007 – January 2010**
Financial Planner

- Providing suitable financial advice to retail clients.
- Meeting the performance standards set by Bluefin

Crest were acquired by the Thinc Group Ltd now t/a Bluefin in October 2007.

Crest Independent Financial Advisers / Crest Financial Group Ltd – Bristol **May 2004 – October 2007**

- Providing suitable financial advice to retail clients from June 2005
- Provided support to advisers: research, report writing
- Office Manager: management information, report writing, commission tracking

AXA Equity & Law / AXA Sun Life – Bristol **May 1995 – April 2004**

- Various roles during my career with AXA include, Administrator, Broker Consultant and Office Manager
- Provided support to Appointed Representatives and Financial advisers over the telephone
- Provided technical support to sales support and administrators and reported to senior management