

Financial Advisers

Background

Financial Advisers are authorised and Regulated by the Financial Conduct Authority (FCA), unlike Pension on Divorce Experts (PODEs). You can theoretically locate one via the FCA register, but you need to know the firm or individual name. The main alternative is <https://www.unbiased.co.uk/> which lists some 27,000 financial advisers. I have not located an option to filter the list to find those familiar with supporting individuals during a divorce or implementing Pension Sharing Orders.

I have therefore gathered together a group of advisers who have expertise in working with divorcing clients. They will be able to help you during the negotiations around the financial split in terms of evaluating which assets are of more value to each party along with the associated taxation implications. Additionally, they all have experience in the process of implementing Pension Sharing Orders.

They can all work with one or other of you helping you to individually negotiate during the divorce and plan for the future post financial settlement. They can also work as a financial neutral. In that scenario they work with you together assisting you in arriving at an equitable division of assets.

I provide their details to my clients and similarly they are all kind enough to refer individuals needing PODE services to me. This is a mutually beneficial arrangement and there are no associated introduction or referral fees involved. Please do mention my name when you contact them.

The Advisers

All of the six advisers will be really pleased to support you through what can be a somewhat traumatic time in your life. It is important that you feel comfortable with the experts who work alongside you, and I am sure that one will be the right “fit” for you.

All of them will be able to help you complete your Letter of Instruction and other Documents enabling you to appoint me as your PODE. They are all familiar with how I work and assisting clients through the process.

Darren Collett - Elmwood Wealth Management

I have known Darren Collett for many years. He and his team are conversant with the implementation of Pension Sharing Orders alongside their expertise as financial planners.

Darren Collett FPFs

Chartered Financial Planner & Fellow of the Personal Finance Society

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Financial Advisers

Simon O'Connell – Evelyn partners

I have a close working relationship with Simon O'Connell, who works locally to me for a Nationwide firm called Evelyn Partners. He is an expert in this arena and also works as a Financial Neutral.

Simon O'Connell APFS
Chartered Financial Planner
Director, Financial Planning
Evelyn Partners

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evelyn
PARTNERS

The power of good advice

Craig Atkins – CA Financial

My third contact, is again, local to me but runs his own business, rather than being part of a large firm.

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Dean Watton – Capel Alley Wealth Management

I have known and worked with Dean for many years

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Financial Advisers

Daniell Gornall

Daniel is based in Clevedon, Bristol and works as either a Financial Adviser working with either party or as a Financial Neutral.

Daniel Gornall BSc (Hons) FPFS
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Kim Sare

Kim is based in Clifton, Bristol and has a great support team, who enable her to focus on finding out what you need and helping you achieve those goals.

Kimberley Sare LLB (Hons) FPFS TEP

Founder | Chartered Financial Planner

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