

# Your local Independent Financial Adviser

# Lloyd & Whyte

Martin Nation ACII, FPFS, Cert CII(MP)  
Financial Services Director  
Chartered Financial Planner



I am a qualified Chartered Financial Planner with 38 years' experience in the profession.

I have worked for Lloyd and Whyte since 1987, specialising in the provision of holistic financial planning to professionals and business owners in respect of their personal finances and wealth management. Many are healthcare professionals introduced to Lloyd and Whyte by their own professional associations or referred to me by their colleagues and friends.

My approach is holistic and to advise I need to fully understand a client's position and what matters most to them.

Wealth management and retirement planning are my specialisms and with pension legislation now so complex the expertise and experience that I can provide together with that of the team behind me makes this the right choice for professionals.

What matters to you, matters to us.

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## Professional financial planning tailored to you



Financial Planning is an ongoing partnership that helps you to fully explore, identify and achieve your financial goals and lifestyle aspirations.

By building relationships we gain a clear appreciation of your life plan which enables us to best deliver an effective, all-encompassing planning service over the short, medium and longer term.

You might be a dentist, vet or optometrist. But we know you're also David, Andrew or Sarah. Unique people, with individual dreams and goals.

## About Lloyd & Whyte

We have specialist experience with healthcare professionals, and being independent means our advice is completely impartial. This blend of experience and independence means we're uniquely placed to help our customers achieve and protect what matters to them.

### Why choose us?

Healthcare professional specialist

Appointed by 6 national healthcare associations, including:

- Association of Optometrists
- British Chiropractic Association
- British Dental Association
- British Society of Dental Hygiene and Therapy
- British Veterinary Association
- Pharmacists' Defence Association

Understanding client aspirations and financial planning needs

Building long term client relationships

Client risk and investment management

Working with your Accountant and Solicitor

Corporate Chartered Financial Planner status

Established since 1946

What can financial planning do for me? >>

