

Your local Independent Financial Adviser

Lloyd &
Whyte

Shane Presley CFP™ MSCI AFPS
Scotland and North East England



I am a Chartered Financial Planner and Wealth Manager with over 20 years professional experience.

I advise professionals and business owners on their private financial affairs. Many are healthcare professionals introduced to Lloyd and Whyte by their own professional associations or other professional advisers.

My approach is holistic and to advise we need to fully understand a client's position and what matters most to them. We therefore put a lot of time in initially to listen to our clients' hopes and concerns.

Retirement planning is my specialism and with pensions now so complex our expertise and experience across the team makes us the right choice for healthcare professionals.

My aim is for clients to not to worry about money and be motivated about achieving the important things in their lives. We all have ambitions and I am passionate about helping clients make smart decisions to get to where they want to be.

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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 clients achieve and protect what matters to them.

Why choose us?

Healthcare professional specialist

Appointed by six 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 for nearly 70 years

What can financial planning do for me? >>

