



Sam Henderson – Chartered Financial Planner

Name: Sam Henderson
Role: Chartered Financial Planner/Director
Contact: samh@hendersonstone.co.uk
Mobile: 07710 520307
Website: www.hendersonstone-am.co.uk & www.hendersonstone.co.uk

Overview

Sam has had more than 40 years of Financial Services, in roles ranging from adviser to the managing and development of advisers as well as a business owner.

Sam has:

- Experience in all core advice areas, specialising in holistic financial planning to assist clients establish, achieve and maintain their desired lifestyle.
- Achieved Fellowship of the Personal Finance Society, including Chartered Financial Planner.
- Works with both private and corporate clients as a Pensions Specialist and with business owners in preparation for a sale.
- Built a solid network of clients by providing advice and quality service throughout the UK to business owners wanting to pass on their wealth tax efficiently to their families.
- Has a network of specially selected experts to support all advice needs.

Specific Skills:

- Near and post retirement planning including Defined Benefit transfer advice.
- Inter-generational and Inheritance tax planning.
- Structuring the sale of a business to maximise the net return.

“Sam Henderson as my financial adviser has been providing me with reliable advice for both my family and businesses since the 1970’s. I wouldn’t hesitate to recommend them to any owner managed firm who needs a professional and trustworthy service.”

Frank Ryan, Managing Director of Kensington Car Rentals Ltd, London. (Retired)

“I work in the higher education sector and earlier this year I decided to take up a flexible working opportunity, and at the same time to consider disinvesting my pension from the company schemes that I had been in for 32 years and to consider other investment products in order to provide an income for the future. I decided to look for the most reputable Financial Advisor that I could find and was advised by a colleague to try Henderson Stone & Co in case they could help. I’m delighted to be able to confirm that their service has been exemplary on every level, and my rather complicated pension situation has been resolved with the utmost expertise and professionalism on their part. I could not be more satisfied with the outstanding service that I have received from Mr Sam Henderson and his team and I look forward to a long-term working relationship with Henderson Stone & Co.”

Matthew P. Cartmell



Transferring out of a Defined Benefit scheme is unlikely to be in the best interests of most people. The Financial Conduct Authority does not regulate taxation planning and inheritance tax planning.

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