

Sebastian Szulc – Financial Planner

Name: Seb Szulc
Role: Financial Planner
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Overview

Seb has worked in Financial Services since 2008, mostly in the role of Financial Adviser.

Experience

- Experience in all core advice areas, including Investment Advice, Pension Planning, At Retirement Advice, Tax Planning and Protection – assisting both private clients and corporate clients working towards achieving their financial planning objectives.
- Achieved Diploma Level with additional CF8 (Long Term Care) and CEMAP (Mortgage) qualifications.
- A member of The Chartered Insurance Institute.
- Worked with both private clients and corporate clients, as well as with Legal and Accountancy Firms.
- Has built up a solid network of clients by providing advice and high-quality service to business owners, clients in the mid stage of working life and people coming up to retirement wanting to maximise their standard of living.
- Has access to a network of specially selected experts to support all your advice needs.

Specific Skills

- Near and post retirement planning
- Investment and pre-retirement planning
- Addressing complex mortgage and protection needs
- Personal taxation and self-assessment
- Inheritance Tax Planning and Trusts

Personal

Interests include hiking and local voluntary work.

Henderson Stone Asset Management Ltd is an Appointed Representative of Quilter Financial Limited which is authorised and regulated by the Financial Conduct Authority.

Mrs M, Orkney Islands, Mid 50s, widow, with children

"I have received financial advice from Sebastian Szulc, and would highly recommend him. I am new to this and Sebastian has been very helpful in assisting me to get the best investment for my needs. He has done so by explaining to me what investments are about and how best he can help. He gave me an assessment to find what I was looking for, then gave me the papers to take away so I had time to read and ask any questions to him or to the company Henderson Stone before committing myself. I have found him very helpful with his knowledge of finances and help in explaining them to me. He updates me regularly on my investment and makes sure I'm happy with the outcome."

The Financial Conduct Authority does not regulate trusts, taxation planning and inheritance tax planning.

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