



KRD

FINANCIAL ADVISERS LIMITED

Tailored Financial Planning & Advice

Profile

Mark has worked within the Financial Services sector since 1996 and has gained wide experience ranging from back-office sales support to independent financial advice. He has also worked in large insurance companies and national adviser practices.

Mark is a family man who believes that no matter what stage of life you are at, knowing that your future is protected and secure, offers enormous peace of mind.

Mark will take time to get to know you and understand your goals and ambitions so that he can provide you with the most effective and suitable solution.

Mark J Smith
Senior Independent Financial Adviser
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Specific Skills

- Pre-retirement planning
- Post-retirement planning
- Investment planning
- Cash-flow forecasting
- Inheritance Tax Planning & Family Estate Protection
- Personal and Corporate Protection Planning
- Personal and Corporate Taxation Planning
- Mortgage and debt planning (including equity release)

Professional Development:

In line with industry requirements Mark maintains his Continued Professional Development program and his Statement of Professional Standing.

Mark continues to study to enhance his knowledge, which enables him to be proactive in an ever changing and complex environment. In turn this allows Mark to remain an integral part of KRD's Financial Advisory team.



Testimonial

Mark has a friendly and professional approach, and it is evident that he genuinely cares about his clients' needs. Mark organised a fantastic, fixed rate mortgage deal for me following completion of a comprehensive financial fact find. My mortgage offer was accepted within 2 weeks of our initial meeting, and this was within a very busy property boom period. Honest and trustworthy, I would thoroughly recommend Mark to all prospective clients. (M. Bird – Essington)