



ABOUT US

About us

How Thompson Financial Consulting Ltd aim to help you

Thompson Financial Consulting Ltd may be able help you – or your company – get to grips with your finances so you can create and protect your wealth.

With a full understanding of your true financial position – and the most suitable advice – you will be able to make realistic and achievable plans for the future. For example, you might be able to retire earlier than you expected and still achieve the level of income you need for a comfortable retirement.

With Thompson Financial Consulting Ltd you will benefit from a **full financial review** indicating how close you are to your financial goals – and giving you the chance to amend or change your plans to meet new or changing needs. You'll also receive **ongoing regular reviews** of your pensions or investments to ensure potential growth and return.

Company philosophy

Our philosophy is very simple.

- ✓ Your financial needs and requirements are at the heart of what we do
- ✓ Complete financial planning for you, to ensure all areas of advice are covered
- ✓ Accurate, honest and reliable financial advice – not a selling exercise
- ✓ Helping you to get involved in the financial planning process – and to see the benefits of good financial planning
- ✓ Regular, face to face financial reviews to build your understanding of what is being done to achieve your goals
- ✓ Achieving first class service for all clients
- ✓ Strong back office support to administer plans quickly and accurately

Thompson Financial Consulting Ltd is authorised and regulated by the Financial Services Authority.

Registered Office: Bay House, 20-22 Market Place, Saxmundham IP17 1AG

Registered in England, No: 6519830





The Thompson Team

You can see Mark during the day, or in the evening, at a place of your choosing. If you wish, you are welcome to come to our office in Hadleigh.

Your first meeting is always completely free, and there is no obligation to deal with us again if you do not wish to do so.

Should you choose to employ our services you can pay by commission, with a fee, or with a combination of the two. You will always be asked about this at the first meeting, to ensure you get the package you are comfortable with, and which is right for you.



Mark Thompson – Company Director / Financial Planner

50 Words to describe Me!

Husband, Daddy, Suffolk, Bury St Edmunds, Countryside, Coffee, Pasta, 007, Holidays, Conscientious, Christmas, Professional, Cinema, Summer, BNI, Football, Curries, Cooking, Golf, Financial Advice, Top Gear, Expert, Greek Salad, Star Wars, Supercars, Conversation, Smiling, Ski-ing, Networking, Business, CSI, Independent, Saw Doctors, Scouts, Radio 5, Financial Knowledge, Greece, Cufflinks, Weekends, Pogues, Hard Work, Friendly, Warm, Organised, Lamborghini, Financial Exams, Entertaining, Socialising, Service to Clients, Caring.

I am Mark Thompson and have lived in Suffolk all my life, but as of yet, not perfected the Suffolk accent! I am married with one daughter and live just outside Sudbury. I am a friendly, warm and outgoing individual who likes to socialise with family and friends.

I started my working life at Barclays Bank as a junior, filling the cash point machines and sitting on the cashiering desks. I undertook many varied roles within Barclays until I became a financial planner for the bank, dealing with personal and corporate clients. I left Barclays early in 2003, due to a strong desire to personally drive myself forward to achieve more in my life, I decided to set up my own business; Thompson Financial Consulting was born.

With no clients and empty filing cabinets, a new baby arriving, moving house and paying for a wedding, you could say it was probably not the best time to leave paid employment. I knew I could succeed and with dedication, self motivation, hard work and with many late nights, my business is now very successful and I pride myself on the proactive financial advice I give to clients.

I used to play Saturday afternoon and Sunday morning football for many local teams and also enjoyed playing squash, badminton and 5 A-side football. Now I enjoy a stroll around the golf course, preferably in the sunshine! I enjoy finding out about new cars, listening to Radio 5 live, eating a good curry and having holidays. I also have a large collection of cufflinks, which seemed to have evolved through my working life and one day I would love to own my own supercar.





THE THOMPSON TEAM (continued)

I am a member of the Chartered Institute of Insurance, this is the institute that sets the qualifications and exams within my industry. I am a member of the local chamber of commerce and regularly go to Business Networking International (BNI) meetings to meet other local business people to see how we can help each other find more business. I am a member of online communities Ecademy, Facebook and Linked In.

I believe my clients deserve an adviser who knows them and their finances extremely well and fully understands their needs and their financial goals. That's the only way to ensure you get the most appropriate products and services for you. My philosophy is simple; your financial needs and requirements are at the heart of what we do. It isn't my business to sell financial products. You come to me for advice and I help you make the right decisions by giving you fair, accurate and impartial advice. I give advice that you can trust.



Wendy Thompson – Company Director / Office Manager

Wendy is a Director of Thompson Financial Consulting Ltd. She has worked in the Banking and Financial sector for more than 20 years, firstly with Barclays Bank and then with Thompson Financial Consulting Ltd.

“We have a great team here who strive to ensure you are well looked after and all your requests and advice issues are smoothly implemented. Our team works hard to ensure you get first class service - and above all that you enjoy dealing with Thompson Financial Consulting Ltd.”



Kay Dawson – Administration Officer

Kay is the Administration Officer. She has worked within the insurance and financial sector for more than 20 years.

“I enjoy my role at Thompson Financial Consulting, ensuring that the administration for our clients’ policies is dealt with quickly and efficiently. The ongoing service and help we provide ensures that you can have confidence in dealing with us.”





TESTIMONIALS

Testimonials

“At the face to face meeting, Mark went through the changes that needed to be made to help continue to build my pension fund value.

The highlights of the review were:

- A massive £41,680 INCREASE in pension fund value;*
- This equates to 11.14% annual growth rate AFTER charges;*
- Switches made to my investment to help keep the fund value growing;*
- Review carried out promptly;*
- Understanding my financial needs now and works with me on my future financial requirements.*

Switching to Thompson Financial Consulting has been one of the best financial decisions I have made...”

Mr D D

“I have now had my first six months report and not only have I made the fees back but gained in total £22,000. I remain confident that I am with the best advisor to continue to keep me in the best position to allow a reasonable income when I retire at 55!”

Ms L A

“We’ve always been really happy with the service you provide – everything is always explained well. We’ve recommended you to others and will continue to do so...”

Mrs R F

“Mark spent a lot of time with us and treated us in a very courteous and professional manner. He was able to inspire confidence with his extensive knowledge of the financial market and various products and services which would suit our needs...”

Mr R & Mrs C L

“Thank you for your excellent advice and service and I would recommend you to friends and colleagues, thank you again...”

Mr R S

“Your advice was first class and your service was prompt, efficient and friendly and from our point of view, totally pain free. We would happily recommend you to anyone needing a financial consultant...”

Mr N P & Mrs J R

For more testimonials please visit our website www.thompsonfc.com





WHY CHOOSE US?

Why choose Thompson Financial Consulting Ltd?

Because we care about your needs

You'll experience our customer care from your first meeting onward – and see for yourself how the team analyse your own specific needs to ensure you receive the most appropriate advice and service.

Our service is not based on selling products – our aim is to deliver in-depth financial planning that will meet your needs now and in the future.

There are no 'quick fixes'. We offer ongoing care and attention, with regular reviews, advice and portfolio valuations to keep your finances firmly on track.

Because your money is well looked after

Thompson Financial Consulting Ltd have full professional indemnity cover, and you and all our clients have access to protection under the Investors' Compensation Scheme.

All clients have full consumer protection, under, for example, the terms of the Data Protection Act and our Consumer Credit Licence.

Because our team have the technical proficiency you are looking for

Detailed research is undertaken for all products to ensure they meet with your needs and that they are the most suitable for you.

All team members are required to work on Continued Professional Development, and we insist on a training and competence regime that is designed to improve skills and knowledge, and continuously raise the standards of the service we offer.

Because we offer all the expertise you require – in one place

With many years of experience in the financial sector – and many years of experience in giving the most appropriate advice to our clients – our team has the knowledge and experience to understand all your financial needs, and give you the guidance you need in all financial planning areas.





How we may be able to help

Investments and Portfolio Planning

What is a good investment for you? That depends on your circumstances, your attitude to risk, your age, your commitments, and the state of the market. So you deserve an adviser who takes all these factors into account, and has the knowledge, expertise and experience to find the most appropriate investment for you.

Personal

- ✓ Reports and portfolio management for trustees
- ✓ Individual Savings Accounts (ISAs)
- ✓ Investment reviews
- ✓ Portfolios for growth or income
- ✓ Asset management/advice
- ✓ Offshore investments

Corporate

- ✓ Company investments
- ✓ Company offshore investments

Pensions – Personal and Corporate

If you have a **personal pension**, you might be surprised to discover just how much is in your pension pot – and to learn the benefits you can gain from ‘freshening up’ your pension planning. For a **corporate pension** the most appropriate advice and the most appropriate planning are even more important. It requires a full understanding of you and your business, careful choice at the start, and regular performance reviews.

Personal

- ✓ Self-invested personal pensions (SIPPs)
- ✓ Personal and stakeholder pensions
- ✓ Personal pension reviews and transfers

Corporate

- ✓ Group personal pensions
- ✓ Group stakeholder pensions

At Retirement Products

Reached retirement? Want to know the different ways to secure a good level of income into your retirement? You may be surprised to know that you can ‘shop around’ to get a better level of income from your pension monies. Also if you suffer from certain illnesses you may be entitled to more income from your pension savings. Get the information you need to make the most of your pension at retirement.

- ✓ Annuities – different options available; enhanced, impaired, variable, guaranteed
- ✓ Drawdown
- ✓ Phased Retirement

Past performance is not an indication of future performance. The value of investments in the Stockmarket held directly through individual shares or indirectly through collective investment vehicles, as well as any income derived from them can go down as well as up. Investment returns cannot be guaranteed and you may not get back the full amount invested. The Stockmarket should not be considered as a suitable place for short term investment.





Protection – Personal and Corporate

Insurance protection may not be something you enjoy thinking about, but – like the fire alarm – it’s something you need to have, even if you hope never to use it.

If you fell ill or died unexpectedly you would want your family and your home to be protected – and you should also consider similar protection for your business and your important employees.

Personal

- ✓ Life cover
- ✓ Critical illness
- ✓ Income protection
- ✓ Mortgage cover

Corporate

- ✓ Key man
- ✓ Shareholder protection
- ✓ Partnership protection
- ✓ Group life
- ✓ Group income protection
- ✓ Group critical illness

Mortgages – Personal and Corporate*

A mortgage is one of the single largest financial commitments you are ever likely to make. You will want to be sure that you have the most suitable deal, and that it meets your specific requirements very precisely.

We can offer you the full range of mortgage deals available in today’s fast-changing market – including some of the most appropriate, and most elusive.

Personal

- ✓ Residential mortgages
- ✓ Buy to let

Corporate

- ✓ Commercial mortgages

Inheritance Tax

Despite the rule changes in October 2007, it is still vitally important to set up your will and your estate in the right way, so that your family, friends and other beneficiaries will receive the inheritances you have planned for them.

- ✓ Advice on gifting
- ✓ Whole of life plans
- ✓ Discretionary gift trusts
- ✓ Loan trusts
- ✓ Insurance trusts etc.

*Your home or property may be repossessed if you do not keep up repayments on your mortgage.

For mortgages we can be paid by a fee option and this is a typical fee of £1500.

The Financial Services Authority does not regulate Taxation and Trust Advice, Offshore Investments and some forms of Mortgages and Individual Savings Accounts.

