financial advice centre

independent face to face advice

Edward Dalley

Senior Associate and Independent Financial Adviser

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Edward Dalley is the latest Adviser to join the highly regarded Worcester based firm of Independent Financial Advisers (IFA), Financial Advice Centre Ltd.

Introduction and qualifications

Ed joins the team as a Senior Associate with more than 7 years' investment and financial experience having gained a diploma in Financial Advice (DiPFA) in 2013 whilst also shadowing and working in technical analysis roles throughout his studies. Ed is one of only a small number of qualified and experienced pensions specialists across the country who have completed the Level 6 Pension Transfer qualification (AwPETR) which enables him to advise on more complex pensions matters. Ed joined Financial Advice Centre Ltd in April 2020 from another local adviser business.

The Financial Advice Centre difference

Ed was attracted to Financial Advice Centre Ltd's outstanding reputation in the area. After getting to know some of the directors in the business, he's impressed and excited by how the firm operates..

> "Financial Advice Centre have at their core a firm alliance to the client. The central investment proposition offered by Financial Advice Centre is **unique and flexible** to work for differing client circumstances. The services are **fairly priced** and as a business, the team are more concerned with building long term relationships with clients than charging high initial fees to make money – a practice all too common in the financial services industry."
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> "This client-centric approach bears itself out in all that the business do from offering a **holistic financial planning** and wealth management services through **a pro-active team** who share expertise to benefit the client and **regular, market leading communications** to all clients to keep them informed with what is happening in the market and to their investments."

Core focus and professional connections

Ed has built a reputation for generating successful outcomes for clients working with professional firms of solicitors and accountants throughout the West Midlands and Gloucestershire. He joins the Financial Advice Centre Team to work across the following areas;

- Pensions and complex pension matters
- Investments and tax wrappers
- Inheritance tax planning
- Court Of Protection matters
- Trust matters
- Protection.

He is now able to offer clients actively managed and risk controlled portfolios ensuring their invested monies are kept in line with the clients' attitude to investment risk while actively staying in line with constantly shifting investment markets. By taking an active role in the Financial Advice Investment Committee monthly meetings, he is part of the team ensuring fund managers are achieving the high standards clients expect.

Financial Advice Centre Ltd Managing Director, Piers Mepsted said:

> "We are very happy to welcome Ed to join our team of Advisers. His personable, thorough and rigorous approach to all matters relating to clients is fundamental to the way we operate and central to our business. Ed is highly qualified, but he has the knack of relating sophisticated concepts to clients in a way that is meaningful, straightforward and easy to understand.
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> He is a welcome addition to our Investment Committee and his clients will benefit from the wide range of services we have on offer and shared expertise."