

Heswall's Helen Whiting is the adviser to trust with your retirement plan



Helen Whiting

Working remotely is now very much a way of life and one which Helen Whiting and her employer, Acumen Financial Partnership, are very much signed up to. "Working a couple of days a week from my home in Heswall is a perfect mix with the rest of the week spent out and about seeing clients, either in their own homes or at one of the firm's other two offices."

Helen was born in Wirral and with more than 20 years' experience in financial services, she has been able to build long-term trusted relationships with many of her clients. With a 21-strong team and its head office in West Lancashire, Acumen manages more than

£400 million of investments. Helen says: "More and more people are trusting us to deliver clear, friendly and straightforward financial advice." She continues, "In the midst of a crisis, it's easy to make the wrong decisions. At times like this, our independence as advisers comes into its own as we are able to guide clients through the financial maze and make sure they consider all options before making decisions."

With high interest rates and so much uncertainty, it's a common misconception that now may not be the best time to invest for the future. "The reality is", says Helen, "that there is never a bad time to get a financial plan in place. There's a saying that the best time to plant a tree was 20 years ago and the second best time is now. Getting your financial ducks in a row and getting a plan in place is no different. Understandably, budgets are really stretched at the minute, but that makes it even more important to feel confident that your investments are in the right place, and that you are not paying more in tax than you should be. Equally, current volatility has the added value of buying investments at lower prices."

Acumen's MD Angela Maher, who set up the company 17 years ago, is proud of her team "We have a close knit and loyal team of advisers and support staff helping people make the most of their hard-earned savings. Trust is at the heart of our approach which means we can make sure our clients make the right decisions, at the right time", says Angela. "Having Helen in Heswall gives her a great ability to connect with her clients in Wirral and beyond and properly understand their needs, but she is also very much part of our team in Burscough and at our new office in Nateby, near Garstang."

Helen adds: "Although retirement seems a long way off for many, it's never too early to have a strategy in place and I hope people will get in touch so I can help with their future plans."



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