one Financial Solutions

Meet The Team

Daniel Barnes - DipPFS
Head of Private Clients

About me

I've been providing financial planning and investment advice to the clients of private banks since 1999. During that time, I've built up a remarkable fund of knowledge, skills and experience generally, along with a specialist understanding of tax-advantaged investment schemes (EIS, VCT and BR) and the use of life insurance to maximize legacy.

My work involves a broad spectrum of clients including other finance professionals, business owners, family offices, Court of Protection deputies, lottery winners, divorcees and those who have inherited wealth.

I'm a member of the Chartered Institute for Securities and Investments (CISI), hold the CII's Diploma in Financial Planning (DipPFS) and a Statement of Professional Standing.

I live in West Sussex and, although my client base is in the London/Surrey/Sussex area, I have clients across the UK.

Contact Me

07801 993 244
db@onefinancialsolutions.co.uk

One Financial Solutions
Chapter House
33 London Road
Reigate Surrey
RH2 9HZ

020 3714 9565
onefinancialsolutions.co.uk

My experience

My career since joining the industry in 1999 has centred principally around providing 'sound professional financial planning and investment advice' to clients of several mainstream financial institutions, including HSBC, Barclays and Credit Suisse, and a number of more specialized organizations such as Irwin Mitchell Asset Management.

Having been engaged in many roles throughout these organizations – culminating in my becoming head of wealth planning at Credit Suisse – embracing these opportunities has resulted in my having an extensive, yet intimate, knowledge and understanding of all aspects of how the financial services industry works.

My time in the industry has also opened doors to many organizations working on its periphery, which has led to my involvement in other, highly rewarding, 'nonmainstream' activities, for example advising the Court of Protection's personal injury clients about life-long income streams.

How I work with my clients

I enjoy my role. It's incredibly pleasing to know that you're making a difference to someone's life, so I strive to find and provide the best possible advice for each of my clients, based on their individual circumstances.

Working with One Financial Solutions provides an opportunity to remove any 'institutional restraints' and to be able to offer a client the very best financial solution available from within the entire market, not just from between the covers of a brochure.

My aim is to deliver advice in a practical and understandable manner using cash-flow modelling to bring financial plans to life – doing so helps clients see the impact of taking one route over another. I believe this allows better decisions to be made at the outset and ensures the plan has sufficient flexibility to cope with whatever life may throw at it.