

Meet The Team

**Paul Keeley - DipPFS, Cert SMP, Certs C11 (MP&ER)
Independent Financial Adviser**

One. Financial Solutions



About me

As an independent financial adviser with over 30 years' experience in banking and finance, I'm delighted to provide sound financial advice to my clients, drawing financial advice, products and services from across the whole of the market.

I provide advice about mortgages, pensions, investments and equity release for my personal clients and on auto enrolment, group personal pensions, employee benefit packages and business protection for those in the commercial world.

I'm a member of the Chartered Insurance Institute (CII) with certificates in Mortgage Advice and Equity Release; hold a Diploma in Financial Planning (DipPFS) and am a member of both the Society of Mortgage Professionals and the Equity Release Council.

I live in Carshalton, Surrey, my clients being located throughout the boroughs of Reigate and Banstead, Epsom and Ewell, Sutton and Stoneleigh.

Contact Me

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My experience

From 1998 I worked as a personal financial adviser, first with Barclays and then HSBC. In 2007 I moved to the commercial sector, developing and managing a portfolio of over 450 clients ranging from individuals to companies with turnovers exceeding £10m.

I've gained an extensive knowledge of the personal and commercial financial sectors and apply this proactively, helping my clients plan their current and future needs.

How I work with my clients

I take pride in providing a personal service; I joined One Financial Solutions in 2013 as I believe that being part of a close-knit team helps provide greater focus.

Building long-term relationships are a priority, so I offer an initial consultation at my cost and I won't transact any business until due diligence is complete, ensuring I provide my clients with the best solution to meet their needs.

What my clients say

"I had a complex investment that other financial advisors had not been able to help me with. Paul showed great perseverance in dealing with a very awkward company, and explained clearly what was happening and why.

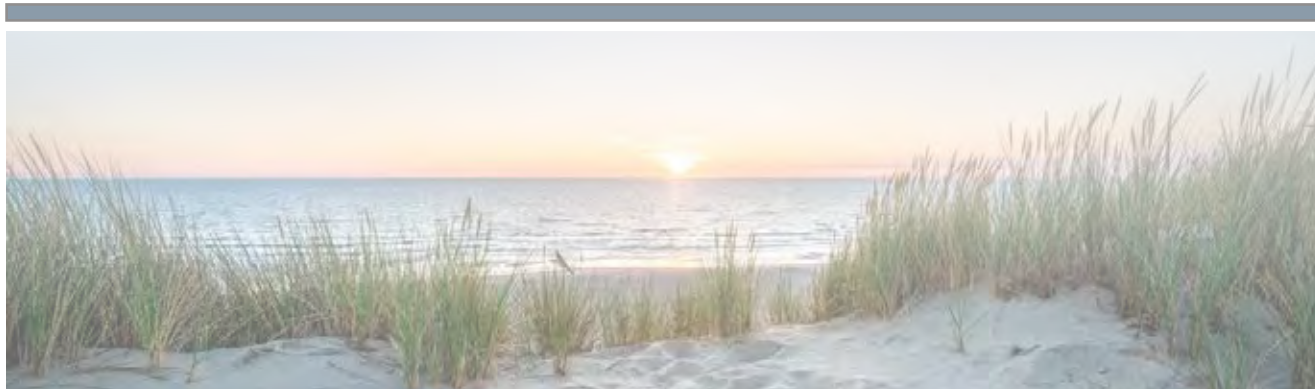
The funds have now been reinvested in a more suitable product. We were happy with the process and a very satisfactory outcome."

Mr & Mrs Rutstein
Epsom, October 2022

"Due to my age I had to sort out my pensions and other financial matters.

I engaged Paul to do this – his help and sound advice certainly took the pressure off. Paul proved to be both knowledgeable and very helpful leaving me very happy with the result. Thanks!"

Mr & Mrs Shah
Wimbledon, October 2022



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