

Meet The Team

**Stephen McMahon - DipPFS, Certs C11 (MP&ER)
Independent Financial Adviser**

**One.
Financial
Solutions**



About me

As an independent financial adviser, I specialise in providing personal and business clients with bespoke advice on all aspects of pensions, investments, equity release, protection and mortgages.

I'm a member of the Chartered Insurance Institute (CII), the Society of Mortgage Professionals (SMP) and hold a Statement of Professional Standing. I'm also member of the Equity Release Council (ERC) and an Accredited member of the Society of Later Life Advisers (SOLLA), who offer advice about retirement, care, equity release and inheritance tax planning to those at the later stage of their lives.

I live in North Lanarkshire, although my clients are located throughout the whole of Scotland.

Contact Me

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My experience

My career in financial services started in 2002. I joined a small firm of independent financial advisers but, after two years, moved to Standard Life and then Royal London. These career moves enhanced my understanding of products and processes and the impact they have on both corporate and personal clients.

In 2016 I was recruited by an international firm of independent financial advisers to provide advice to SMEs and personal clients, and then joined One Financial Solutions in 2018 as one of the first members of the firm's Glasgow office.

How I work with my clients

I believe honesty and transparency are key attributes in building a long-lasting client relationship – one that gives you, the client, confidence in my abilities and peace of mind that your financial affairs are being expertly managed from start to finish.

I will always treat you as an individual, reviewing your circumstances, needs and objectives on the basis that like you, they are also unique. Only after we've discussed, reviewed and analysed your financial position will I seek the best solution to meet your goals,

What my clients say

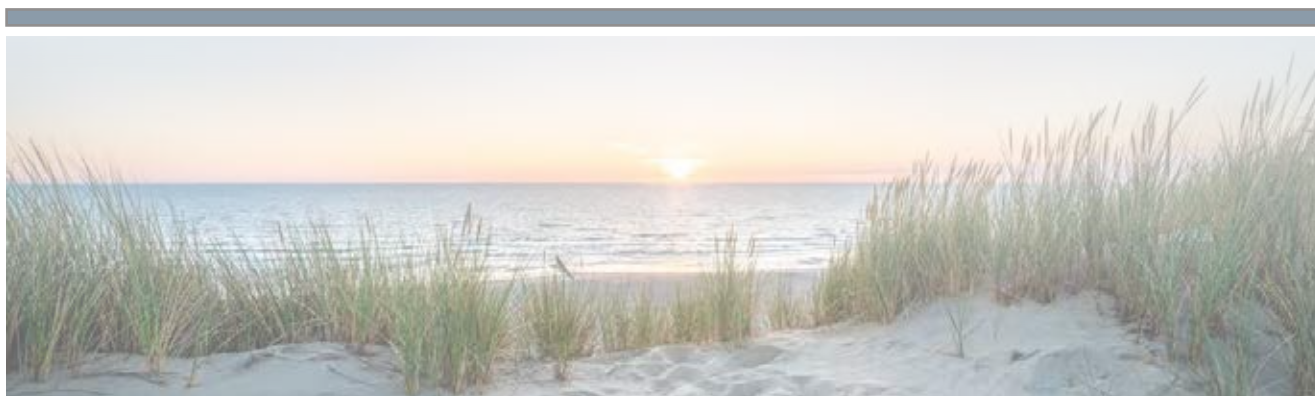
"I went to Stephen with several pensions that had built up over the years. After explaining them, he consolidated them and ensured they were invested so that I could draw down on them in retirement. He explained the tax liability and now manages both this and the investment. Stephen drew up a plan for me and my wife to show how long the pension would last if I took out the amount I needed for my retirement."

Mr Archibald
Glasgow, November 2022

"I was looking to take my tax-free lump sum from my pension which I urgently needed. Stephen talked me through everything to do with this and then arranged it.

We moved my pension into a draw-down pension policy which Stephen is looking after for me. We will look at more drawdown when I fully retire."

Mr Kevin Leckie
Airdrie, March 2023



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