Croft&Oakes
CHARTERED FINANCIAL PLANNERS

With you every step of the way to a bright financial future.

KEITH CROFT, FPFS

FPFS CERT CII (MP)
CHARTERED FINANCIAL PLANNER

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QUALIFICATIONS

Personal Finance Society (PFS)
Fellow - FPFS

The Chartered Insurance Institute (CII)
Chartered Financial Planner

Certificate in Mortgage Advice
Cert CII(MP)

Advanced Diploma in Financial Planning
AF1 - Personal Tax and Trust Planning (CII)
AF3 - Pension Planning (CII)
AF5 - Financial Planning Process (CII)

Diploma in Regulated Financial Planning
J01 - Personal Tax (CII)
J02 - Trusts (CII)
J04 - Pension Funding Options (CII)
J05 - Pension Income Options (CII)
J06 - Investment Principles, Markets and Environment (CII)
J08 - Financial Planning Practice (CII)
R01 - Financial Services, Regulation and Ethics (CII)

Advanced Financial Planning Certificate
H15 Sales Management & Supervisor

Certificate in Financial Planning
CF1 – UK Financial Services, Regulations, and Ethics
CF3 - Financial Protection (CII)
CF4 - Retirement Planning (CII)
CF5 – Integrated Financial Planning
CF6 - Certificate in Mortgage Advice (CII)

OVERVIEW

For more than two decades I have been fortunate enough to work with some of the world's largest Banking and Wealth Management organisations, this has given me the opportunities to develop my knowledge and experience alongside some of the greatest minds in financial services, which has enabled me to build up my knowledge as a Chartered Financial Planner and a Fellow of the Personal Finance Society.

That said, what has really made my career special is the clients I have been lucky enough to advise. Ever since the beginning of my career, as a Banking/Mortgage Adviser with Halifax Building Society, to now as the founder of Croft and Oakes Financial Planners, I have always strived to provide an honest, unbiased, professional and friendly approach to clients when advising on their financial needs.

EXPERTISE

Whilst I always encourage a holistic approach to financial planning, my career path has meant that I have developed certain areas of expertise, particularly in the fields of Inheritance Tax Planning, Trust Advice, Pensions Solutions and Investment Planning.

HOBBIES AND INTERESTS

I have lived in Shropshire for most of my life, enjoy the occasional game of golf and I am an avid lover of the big screen.

I have been married to my wife Chris for over 20 years and we have two grown up daughters and a little old dog called Snoopy.

CAREER HISTORY

Chartered and Independent Financial Adviser
(2016 - present) Croft & Oakes

Chartered and Independent Financial Adviser
(2014 - 2016) Derwent Financial Planning

Wealth Management Adviser
(2010 - 2014) Lloyds Wealth Management

- Specialised in Inheritance Tax Planning and Pension Transfers
- Advice to high-net worth clients from Halifax and Lloyds Private Banking
- Advised on corporate investments, pensions planning and succession planning

Inheritance Tax and Pensions Specialist
(2008 - 2010) Bank of Scotland Investment Services

Senior Personal Finance Adviser
(2000 - 2008) Halifax Building Society

Personal Finance Adviser
(1997 - 2000) Halifax Building Society

Banking / Mortgage Adviser
(1993 - 1997) Halifax Building Society