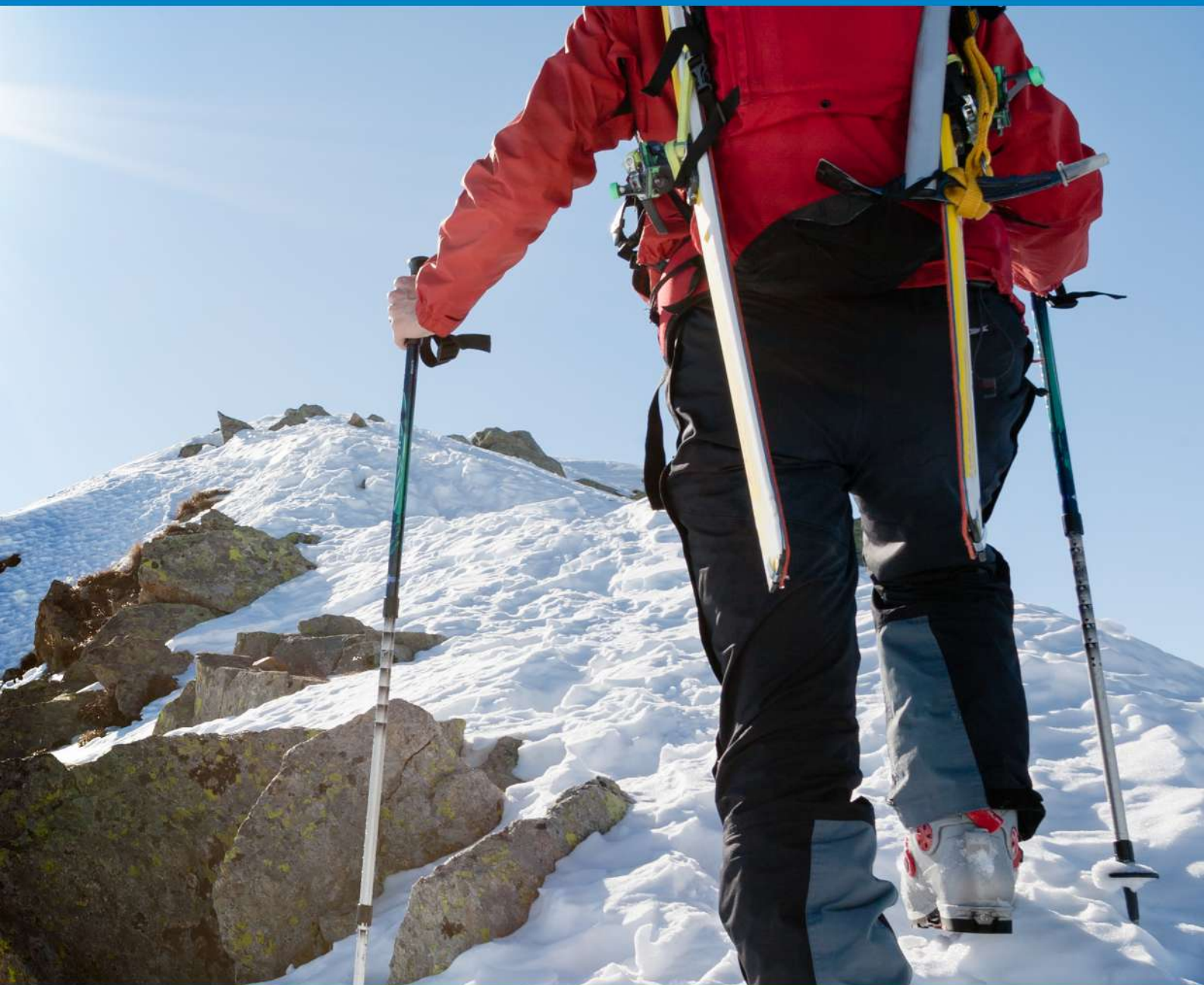


Media relations pack





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We're always happy to talk, and can help you with:

- 🔧 Expert comments on pensions, savings and planning for the future
- 🔧 Bespoke statistics from our extensive database
- 🔧 More information about Portafina

If you need anything else, just ask. Whatever it is you need, feel free to either contact us directly or talk to our agency Jaywing PR.



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Who we are

Portafina began in 2009 as Portal Financial. Our goal was to make pensions advice clearer and more convenient for clients. We quickly grew into one of the UK’s leading retirement advisers specialising in the pensions freedoms, with:

- 130+ members of staff
- Over £1/4 billion funds under management
- More than 11,000 clients

In 2016 we changed our name to Portafina. This better reflected the service people experienced – friendly and unintimidating.

We get that pensions can be dull. What’s exciting is what you ultimately get from them: the opportunities, the freedom to live the life you want, to treat yourself and others.

We help people to achieve their best future.

What we do

We do our best to make great financial advice accessible for everyone. The key to this is removing the barrier of upfront fees. You can get our full advice without any obligation to pay. This has proved to be very attractive to people.

Our process is simple: we operate a telephone-based service and do not charge an upfront fee for our advice service. If people like our advice and ask us to carry out our recommendation, then that’s when a fee would be due. We explain the fees fully upfront as part of our advice. If they decide to do nothing, or we recommend they stay as they are, then they do not pay us a penny.



Testimonials

“ Hard to find great service like this today - I would call them the John Lewis of financial advisors!
J. Joinson

“ This was the most professional company I’ve ever dealt with, a format other companies should follow.
P. Brittle

“ I know absolutely nothing on these matters and your advice makes perfect sense to me.
D. Crosier



Partners



Jamie's financial career began when he joined Lloyds TSB in his teens, and in 1999 he was hired by Berkeley Jacobs, then one of the UK's leading IFAs. When the company was sold in 2004, Jamie applied his knowledge and skills to fulfil an ambition of working for himself and became a self-employed IFA. In 2009, he teamed up with former Berkeley Jacobs partner Andy Moore and his brother Tim Moore to start Portal Financial.

Jamie is also dedicated to raising money for charity. His efforts have included boxing, marathons and skydives, and fundraising is part of Portal Financial's DNA.



Andrew has been involved in financial services since the age of 20, and started his own IFA practice in 1991. In 2000 he sold his company to IFG PLC and in 2009 founded Portal Financial. Andrew is a Fellow of the Personal Financial Society and a Chartered Financial Planner. In his youth he was a keen rugby player, as well as a member of Britain's National Youth Squad for dinghy racing. Andrew lives in both the UK and Thailand and his diverse interests include sailing, fishing, scuba diving, walking his dogs and attending music festivals.



Tim studied aeronautical engineering at Manchester University before embarking on a career in marketing. After graduating, Tim worked at the BBC where he organised consumer exhibitions including Top Gear and Auto Sport International, before later launching France Telecom's UK digital strategy. In 2009, along with his brother Andy and Jamie Smith-Thompson, Tim launched Portal Financial.

Away from work, Tim can usually be found with his wife and daughter or telling stories about his trips, which include biking across India and trekking to Everest's base camp.



Case studies

We have a selection of clients that are happy to be featured as case studies to add further depth to news stories. Our case studies are located around the country and are ready to talk to you.

Here are some of our recent features. To see a selection of our happy clients, just click here [link to success stories page](#)



Alan has two personal pensions and a company pension. He decided to remove half of the tax-free cash from a personal pension to clear credit card debts, leaving the remaining two intact. **Alan Adler, 1957, Leicestershire.**



Keith was already in a drawdown plan, and decided to use the pension freedoms to pay off outstanding debts. Keith also has other pensions, including with the Royal Mail and the army. **Keith Byard, 1952, Nottingham.**

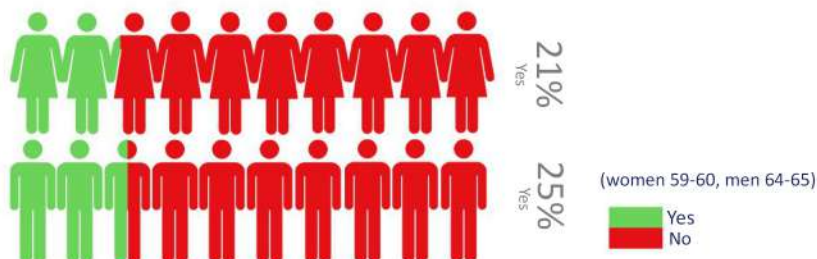


Andrew took his entire 25% tax-free cash allowance, which he used to purchase a car, and he reinvested the rest of his pension fund into a Novia SIPP. **Andrew Colbourn, 1957, Northampton.**

Research

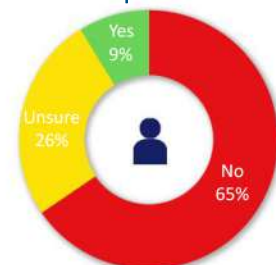
We regularly conduct our own surveys to gain real-world feedback and insights. With our own large database, we can conduct bespoke research for your story. If there is particular information you are interested in, we can conduct new research for you.

Q. Are you intending to use the government's free retirement guidance service?



February 2015

Q. Are you planning to cash in your entire pension pot under the new rules in place from April?



January 2015