



Steve Bennett,
Dip PFS
Director & Financial Planner

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ABOUT

Steve's focus as the business grows is ensuring the excellent level of customer service which Wealth Design was founded on continues. Each client should feel confident that the team are there to support them throughout their life and we must ensure we have the capacity to deliver on this. Steve ensures everything is in place to deliver on this promise.

Steve thrives on the fact that Wealth Design is like a family, sharing the same common goal of doing a good job for clients. He especially enjoys taking clients through the whole journey, being presented with a problem and working out the best route to a successful solution, with client satisfaction at the top of his agenda.

He brings to Wealth Design considerable experience in inheritance, pension and trust planning.

CAREER HISTORY

Steve cofounded Wealth Design with David Philips in 2014. Steve worked in various areas of banking from 1989 to 2012, including regulated sales and independent advice for high net worth clients.

QUALIFICATIONS

- Steve is working towards Chartered Status
- Diploma in Financial Services
- Award in Long-Term Care Insurance

FUN FACTS

- At a personal level, Steve is very keen to maintain a fitness regime that has enabled him to lose 4 stone in weight.
- He is particularly enthusiastic about cycling and takes on an annual 100-mile cycling challenge.
- A family man, Steve has a son and stepson.

ADDRESS

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WEBSITE

www.wealthdesign.co.uk

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