



## **ABOUT:**

What is most important to Steve as the business grows is that they continue to deliver the excellent level of customer service on which the business was founded. Each client should feel confident that the team are there to support them throughout their life.

Steve believes it is essential for the team to feel that they make a difference as well as for clients to observe through the team's behaviours that they are valued.

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.

## **ADDRESS:**

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# **STEVE BENNETT**

**Dip PFS - DIRECTOR**

## **CAREER HISTORY:**

Steve worked in various areas of banking from 1989 to 2012, including regulated sales and independent advice for high net worth clients. He brings to Wealth Design considerable experience in inheritance and pension planning.

## **QUALIFICATIONS:**

- Diploma in Financial Services

## **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 shortly.
- A family man, Steve has a son and stepson.
- Steve has a holiday home in Portugal.

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