



Darren Bilkey

Darren is well regarded for imparting expert financial advice in a way that is clear and easily understood. He has developed a loyal base of clients through referrals and personal connections, reflecting the high level of service he provides. Darren provides a completely independent financial advice service, offering support on a wide range of financial planning needs including;

- Retirement planning, from accumulating pension savings cost effectively to managing the withdrawal of funds in retirement in the most tax efficient way
- Investments and savings of all kinds, whether oriented towards income, capital growth or both
- Estate planning, including inheritance tax mitigation through use of trust structures, investment bonds and whole of life plans
- Financial personal protection, including life assurance, critical and serious illness cover, income protection, family and personal cover
- Corporate risk management, to ensure the continuity of businesses in the event of the loss of key personnel, and the provision of contingency funds to allow for the purchase of shares in the event of early ill health, retirement or death
- Group employee benefits including death in service, critical illness cover, sick pay arrangements, Permanent Health Insurance

In addition to offering a broad range of financial advice to clients he also provides specialist advice in the area of inheritance tax planning, including financial planning solutions for high net worth individuals. This includes private clients, company directors, professionals and business owners, including their own clients or employees.

The value of your investment can go down as well as up, and you can get back less than you originally invested.

Qualifications

Financial Planning

Diploma in Regulated Financial Planning

Generic Advice

RO6

Pensions

RO4 | RO8 | AF3

Taxation

RO3 | AF1

Investment Planning

CeFAP | RO2 | AF4

Protection

RO5

Long Term Care

CF8

Award in Long Term Care Insurance

Mortgage Advice

Certificate in Mortgage Advice
& Practice (CeMAP)

Equity Release

Certificate in Equity Release

Trusted Financial Advice

Call Darren Bilkey today on:

📞 07891 432348 or 📞 01726 72260

Email us: ✉️ darren.bilkey@tfagroup.co.uk

Follow us: 🐦 @TFAadvisers

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Testimonials*

“Excellent service given from Darren who I have found to be very organised, efficient and thorough in his approach to financial advice. Financial options well explained with very good visual information to help to make my decisions. Personal finance portal is an excellent way of sending and receiving confidential information and keeping up to date with my portfolio. Appreciated Darren’s assistance with filling in documentation and contacting various companies on my behalf. I have recommended Darren to some of my colleagues - something I wouldn’t have done if I wasn’t 100% happy. Looking forward to future contacts/reviews.”

Existing Client, Cornwall

“Darren has been meticulous in sorting out our pensions and savings investments so that we are confident that we are on the right track. The most helpful piece of advice has been being able to see financial predictions going forward through into retirement giving us piece of mind. Added to that the investments that Darren has made on our behalf have been confidently growing this past year.”

Existing Client, Cornwall

“Darren has given excellent advice regarding retirement planning options to my husband and I. He has also helped us to manage our life insurance cover. Darren understands our retirement priorities and our attitude to risk. He is very quick to respond to any emails or phone messages and always can be trusted to do exactly what he promised following meetings and conversations. We feel comfortable to ask him any questions. He gives very balanced advice, always pointing out the pros and cons of each of our options. He explains any process involved in setting up a policy or pension and clearly states any charges upfront.

I often recommend Darren to colleagues, friends and family.”

Existing Client, Cornwall

“I came to a watershed in my life and with my family was reviewing my financial position. Darren was personally recommended to me - and I have found him to be excellent in every area. My financial situation was not simple!! Darren has quietly and thoroughly gone through my whole financial case in a competent and efficient manner. I cannot praise his work enough! Thank you.”

Existing Client, Cornwall

“Our mortgage fixed rate was due to expire, and we wanted to have advice for the best offers available to us and also look at the potential for expanding our property portfolio. Darren took the time to listen to everything we wanted and had to say and then found us the very best offers available- far better than we had found ourselves and showed us how it would be possible to achieve our future plans, all in a way that was so easy to understand.

Nothing was too much trouble for him, the service he provided us with is beyond compare and we are so very grateful and would recommend him so very highly.”

Existing Client, Cornwall

“Darren has continued to keep me up to date with developments regarding my investments and future plans. He has taken any action I deem necessary to keep everything on track. Darren has ensured that he and I am totally clear on what I want for my future. He has also mentioned some important aspects of financial planning which I had not thought about!

I have no hesitation whatsoever on recommending him to you!”

Existing Client, Cornwall

*Testimonials collected from VouchedFor (www.vouchedfor.co.uk)

Trusted Financial Advice

Call Darren Bilkey today on 07891 432348 or 01726 72260