ADVICE YOU CAN TRUST

Martin Jones DipFA MLIBF

Company Director and Independent Financial Adviser

Martin is a fully qualified Independent Financial adviser who has been with Keen Investments for 23 years and has over 35 years of experience within the industry. Customers often mention how Martin treats his customers like family.

"For many years Martin has been very professional, courteous and afforded whatever time it takes to make sure everything is done to my satisfaction." - Mrs. G. Ireland

martin@keeninvestments.co.uk | 07850 930520

Gus Davies DipFA MLIBF CeRER CeMAP

Independent Financial Adviser

Gus has been with Keen Investments for the last 8 years and has over 25 years of industry experience. Gus's friendly and welcoming approach has created life-long relationships with clients.

"I wanted to take this opportunity to thank you for all the advice and service you have provided me with over the years and it has been a pleasure to deal and recommend you to friends and family." - Mrs. N. Davies

gus@keeninvestments.co.uk | 07850 90519

Steve Lewis BSc CertPFA MLIBF FIT

Trainee Financial Adviser

Steve is a qualified Paraplanner and is studying to take on further professional qualifications to become a fully qualified Independent Financial Adviser.

steve@keeninvestments.co.uk | 01639 646 464

KEEN INSURANCE & INVESTMENTS

40 YEARS

For more information, give us a call on 01639 646 464
or email us at info@keeninvestments.co.uk

keen investments

Helping you see the bigger picture

KEEN INSURANCE & INVESTMENTS
40 YEARS

HELPING YOU SEE THE BIGGER PICTURE

HAVE 40 MINUTES OF FREE FINANCIAL ADVICE ON US

Here at Keen, we are proud to be celebrating our 40th year of trading this year. As a thank you to all of our customers we would like to give something back to you.

We actively encourage our customers to look at the bigger picture by taking positive action now for prosperity later. Our professionally qualified team of financial advisers work closely with you and your family to plan for the future. As Independent Financial Advisers, we are able to take a holistic approach to advice and tailor situations to fit your unique needs and circumstances.

We are here to help. Whether you are looking for support with your pension, thinking of purchasing a new property or releasing equity from your home, or simply wanting to make sure that your family are taken care of should the worst happen.

A free no obligation 40 minute consultation could help answer all of these questions and more.

PENSIONS & INVESTMENTS

Pensions and investments are important savings tools for your future. Our advisers can assess your current financial situation and explain what steps should be taken to achieve your short and long term goals. Do you ever have questions like these?

A free no obligation 40 minute consultation could help answer all of these questions and more.

How does inflation affect the value of my money?

When will I be able to retire?

How much will I need in retirement?

PROTECTION

Protection policies offer reassurance to you, your family and your business that you are left financially secure in the event of an illness or death.

Establishing a protection policy now could save you money, time and worry. If you proceed with the policy, our fees are paid by the provider at no cost to you.

With a free no obligation 40 minute consultation, we can asses your current circumstance and offer independent advice.

How long would my savings last if I were unable to work?

How would the bills be paid in the event of a serious illness?

How would the family cope with the death of a parent?

To book your free consultation call 01639 646 464 or email info@keeninvestments.co.uk

MORTGAGES

Your mortgage is likely to be the largest financial transaction in your lifetime. With a complex list of providers, off-the-shelf products and a fluctuating interest rate it can be difficult to find the solution to your unique circumstances.

Our advisers can search the entire market to find a solution tailored to meet your requirements and exceed your expectations.

A free no obligation 40 minute consultation could help answer all of these questions and more.

Are you asset rich and cash poor?

Do you know the interest rate on your Mortgage?

How can I help my children get on the property ladder?