

Naomi Keith DipPFS

The Aspire Partnership LLP : : 61 Queen Charlotte Street, Bristol BS1 4HQ

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Profile

Naomi is a Diploma qualified financial planner who is keen to create good financial habits in her clients. By consistently and efficiently delivering sound financial planning advice, she hopes her clients will realise their personal goals and get what they really want out of life.

Naomi is used to the fast paced London life where she has worked for the past 8 years but is no stranger to Bristol & Bath either as she has now returned to live in the South West where she originally comes from. Distance is no barrier for her personable but no fuss approach to helping clients accumulate wealth in a tax efficient manner.

Qualifications & Affiliations

Naomi's qualifications cover personal taxation, investment principles & risk, pensions and retirement planning, financial protection, mortgages and lifetime mortgages (equity release). She is currently working towards her Advanced Diploma with the Chartered Institute of Insurance. She holds:

- **Chartered Insurance Institute –Diploma in Financial Planning**
- **Chartered Insurance Institute –Certificate in financial planning**

Work history

The Aspire Partnership LLP

Sept 2017 – Present

Founding Partner and Financial Planner

The Aspire Partnership was created to offer a financial planning service which helps people make the most of the opportunities that they come across. Aspire's philosophy is to provide clarity, transparency and a client focused approach therefore client's should feel they are dealing with a firm that truly has their interests at heart and can help them to meet their own personal goals and aspirations.

Aspire deal predominantly with the financial needs of individuals, small business owners and those who look after other peoples' money (Trustees, Attorneys & Deputies). Aspire offers tailored services to meet the needs of these different client groups.

Naomi's skills include: excellent client empathy; strong communicator; personable, technical analysis & research.

Responsibilities:

- Financial Planner – responsible for providing suitable financial advice to retail clients

Interests: Women in business, general fitness, travel and spending time with her young family.

Client testimonials are available on request

**Brooks MacDonald – London
Financial Consultant**

January 2012 – July 2017

Naomi left Brooks in London to relocate with her family to Bath.

Responsibilities:

- Providing suitable financial advice to retail clients.
- Ensuring client expectations are met within Brooks framework set

**Bluefin Financial Advice – London
Financial Consultant**

Jan 2010 – January 2012

Responsibilities:

- Providing suitable financial advice to retail clients.
- Creation of bespoke service-based client solutions providing trusted financial planning and quality advice

**Thinc Group – Bristol
Financial Adviser**

November 2007 – January 2010

- Providing suitable financial advice to retail clients.
- Meeting the performance standards set by Bluefin

Thinc Group became Blufin

**Crest Insures Ltd – Bristol
Mortgage adviser**

Feb 2005 – October 2007

- Providing suitable mortgage advice to retail clients

Crest were acquired by the Thinc Group Ltd now t/a Bluefin in October 2007.