

BURLINGTON

A S S O C I A T E S

Balvinder Sohi - Financial Planner / Independent Financial Adviser

E: balvinder@burlingtonfs.com

T: 020 7329 7500

F: 020 7329 7501

Balvinder has over 10 years of experience in providing impartial Fee Based Financial Planning advice both in the private client and corporate arena. His client centric approach has allowed him to attain the privilege of being regarded as a “trusted adviser” for many of his clients over this period.

He graduated with a degree in Economics and then decided to extend his academic career by studying for a Master’s of Science in Business Finance at Brunel University. Fresh out of university he took up his career in financial services, within the wealth management division of The National Westminster Bank, as a trainee financial planning manager. Gaining an “educational experience” as to the workings of a tied banking environment, Balvinder then decided to progress his career by becoming an Independent Financial Adviser (IFA) with a well established city based IFA firm. His main area of expertise is helping clients construct a robust strategic financial plan that allows them to fulfil their lifetime time planning objectives and provides a mechanism for clients to structure, manage and review their financial affairs in an informed manner.

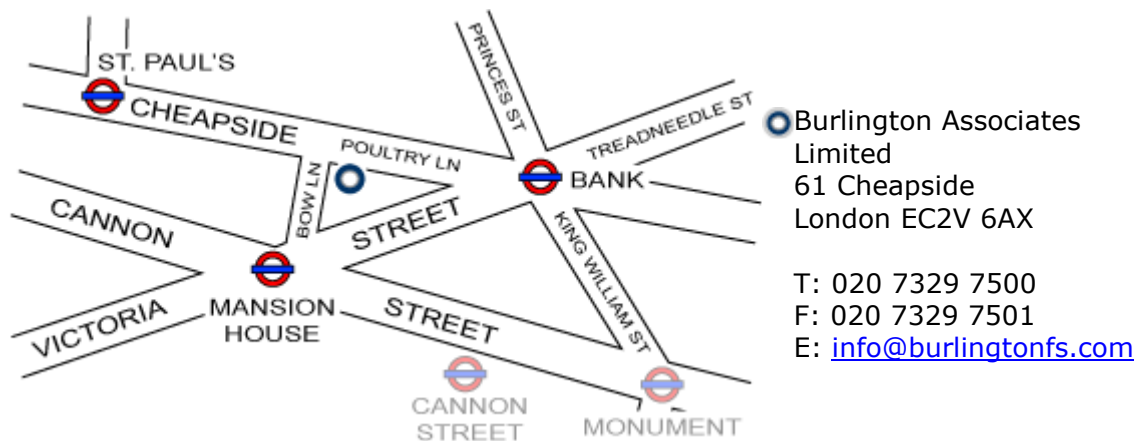
Balvinder also has extensive knowledge/experience of dealing with corporate clients and their constituent staff – at all levels. Balvinder has also obtained a number of examinations at advanced level in Financial Services disciplines since embarking on his career and is working towards gaining a Chartered Financial Planner status.

Balvinder is married with two young sons and lives with his family in a small village in south Buckinghamshire. Outside of work he describes himself as a “arm chair” football fan and has been following his beloved Arsenal FC for over 20 years and has collected an interesting array of Arsenal memorabilia over the years including a match day programme when Brazil played the mighty Arsenal in 1961!

BURLINGTON

A S S O C I A T E S

MAP & DIRECTIONS TO OUR CHEAPSIDE OFFICE



Directions

From Bank Station: Take exit 9 and the up escalator by the Boots Opticians. Take the right hand exit at the top of the escalator then turn left onto the pavement towards St Pauls along Cheapside. Number 61 is about 300 yards along the road on your left, after one road crossing. We are in between Daunt Books and an Orange Mobile phone store. Our office is on the first floor.

From St Pauls Station: At street level, Cheapside is the main road heading east and now has the 'New Change' shopping centre off it. Number 61 is approximately 500 yards away on your right, (near the prominent Church Clock) and just after the bow lane intersection. Our office is on the first floor.

From Mansion House Station: Take exit number 4 which will bring you out into Bow Lane, turn left along this pedestrianised route until you reach Cheapside (approximately 150 yards). Turn right along the pavement at Cheapside and number 61 is just a few yards along from Bow Lane, adjacent to Daunt Books and an Orange mobile phone store. Our office is on the first floor.

If you are in any need of assistance please do not hesitate to call us on 020 7329 7500