

BATTING PARTNERS



Hugh Rodgie, 53, who lives in Bromley, south London, with his wife Allison and their 18-year-old daughter, is in the dugout this new year but plans to convert his next start to big scores...

I HAD A LONG INNINGS AT AN INVESTMENT BANK – 31 years. I started at the bottom and ultimately became a senior manager. Latterly, I worked in the client team looking after cash management for large corporates. I had expected to work there until I turned 60.

REDUNDANCY WASN'T ENTIRELY UNEXPECTED – I knew it was coming – but when the announcement happened it took a while to digest. Ian was one of the first people I spoke to. I hold him in high esteem and wanted his advice – I knew he'd be able to devise a plan.

AT A TIME WHEN I REALLY NEEDED AN ANCHOR he's been there. Without an adviser like Ian, the situation would have been much more stressful.

I KNOW WHERE I WANT TO GO – it's Ian who has provided the figures and the strategy to get there. The advice I've been given has ensured my investments are firmly on track to reach the standard of retirement I'm seeking.

I'VE BEEN WORKING SINCE I LEFT SCHOOL 35 years ago so I'm taking a month or two off before potentially going back into finance in London. I plan to explore all avenues – contract and permanent positions. My circumstances have changed dramatically but the goal remains the same – to build up my pension and investments before I retire.

I FIRST ENCOUNTERED KELLANDS CHARTERED FINANCIAL PLANNERS through my old company pension scheme. I knew I had to save for retirement, but [Kellands' managing director] Guy Kelland painted a vivid picture of what making pension contributions and getting tax relief would mean for me.

APPROACHING 50, I REALISED IT WAS A STAGE IN MY LIFE when I needed a one-to-one service – that was when I asked Ian to be my financial adviser. My first impression was that Ian was a really nice guy and that's proven to be the case.

YOU HAVE TO TRUST YOUR FINANCIAL ADVISER – you're putting your future in their hands. Kellands has built my trust over the years. It was a considered decision and not one I took lightly, but I knew I could trust them as a company and Ian as an adviser.

HE'S A GOOD BIT YOUNGER THAN ME, but I didn't think about his age at all – just that he is suitably qualified to give me the advice I need. He's very likeable. We share lively banter about our respective football teams. He's so easy to talk to that it hasn't been hard to build a personal relationship with Ian or for him to gain my confidence.

KELLANDS HAS BROUGHT ME peace of mind. I know my investments and retirement plans are in safe hands and being constantly monitored. Ian is actively looking at what is invested where for my benefit.

I'VE GOT MY HEALTH, and long may that continue. I want to remain active in retirement for

Redundancy was a swing ball for Hugh Rodgie, but his run rate is high thanks to his batting partner Ian Boasman

as long as possible. I like being outside. I like travelling – my wife even more so – so we'd like to be able to go on holiday when it suits us. I like walking in the Lake District and have a brother who lives in the north of England, so I hope to go on walking holidays with him. I love sports – cricket is

a real passion of mine. I plan to spend my summers watching cricket.

I'LL TURN 55 IN AUGUST 2021 – that and being made redundant are two big life events that require top rate financial advice and that's what I'm getting at the moment.



Ian Boasman has worked in various financial services roles since the age of 18, but it wasn't until he progressed from paraplanner to chartered financial planner at Kellands in Hale, Cheshire, four years ago that he discovered the personal satisfaction of batting for the same team as a client...

WE USED TO LOOK AFTER THE GROUP pension scheme for a well-known Scandinavian investment bank. A number of private clients evolved from that relationship, with quite a few individuals asking us to look after them personally, Hugh being one of them.

HE HAS RECEIVED GENEROUS PENSION CONTRIBUTIONS from the bank over the years. Recently, he's been able to pay off his mortgage and he's been trying to max out his pension contributions. I take a lead role in the investment committee at Kellands in addition to my advising role. Keeping an eye on the market, new products and other innovations complements the advice I give to clients.

I STRUCK UP AN INSTANT RAPPORT with Hugh. We have a similar sense of humour and had a good connection from the outset. We also share a love of football – he supports Bromley FC and me Altrincham FC, two non-league teams, so we have a laugh about that.

WE'VE PUT A PLAN IN PLACE FOR HIS REDUNDANCY PAYMENT and consolidated some

pension assets. Although his was a voluntary redundancy it was still a stressful time. I was pleased to be able to guide Hugh through it both financially and personally.

HE'S NOW LOOKING AT THE NEXT STAGE of his life. Through careful cash flow modelling analysis, I've been able to show that he's ahead of where he thought he was in terms of planning for retirement. I enjoyed sharing that news with him – it was like his eyes had been opened and a weight had been lifted off his shoulders. It is nice to have been able to provide him and his wife, Allison, with the security of knowing they're in a comfortable position.

THE MOST REWARDING THING IS BEING ABLE TO GIVE SOMEONE BREATHING SPACE – to see their plans come to fruition earlier than they had expected – but it doesn't stop there. It's about working with clients throughout retirement and beyond, ensuring that their hard work can be passed down to future generations.

I MEET WITH HUGH REGULARLY IN LONDON, which is less than two hours away door-to-door – quicker than some people's commute into London. He knows he can see or speak to me whenever he needs to. Our meetings from now on are likely to take place at his home and involve Allison too. It's a hands-on and personal relationship – we want to go above and beyond for our clients.

OURS IS A PROFESSIONAL RELATIONSHIP first and foremost – there is a line – but if Hugh wasn't a client, he would definitely be a friend. ■



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