



Stratagem Financial
Planning

[HOME](#)[ABOUT](#)[SERVICES](#)[NEWS](#)[CASE STUDIES](#)[CONTACT](#)[CLIENT LOGIN](#)

ABOUT US

WELCOME TO STRATAGEM FINANCIAL PLANNING

At Stratagem Financial Planning, we believe stability and security are key in life. Your financial planning, whether **personal** or **business**, should be in the hands of those who value accuracy, patience and plain speaking. You may be at a crossroads in your life, or at the beginning of an entrepreneurial journey – that high-quality service must remain the same.

David and Paul, our founders, wanted a better standard of finance support. With their combined experience of over 35 years, and the ever-expanding expertise of our team, we are delivering it for companies and individuals from our base in Poynton, Cheshire. Access to Chartered financial expertise is a big part of why we're so valued in our community, and the other clients that we help throughout the UK.

We're used to sitting down with clients and talking through their options. But, equally, we're at home with technology, underpinning the reasons behind our advice. Stratagem Financial Planning take into account the *personal* and the *practical* for a holistic approach to financial planning.

From key person insurance to pension planning, this never wavers. The longer we assist you, the better we can help your achievements flourish. It's a relationship worth learning about...

[Contact us](#) →



Stratagem Financial
Planning

[HOME](#)[ABOUT](#)[SERVICES](#)[NEWS](#)[CASE STUDIES](#)[CONTACT](#)[CLIENT LOGIN](#)

OUR TECHNOLOGY

Every client benefits from our analytical tools. We can profile risk, assess your portfolio, and use this data to create a cash flow forecast that maps out your wealth over time. We regularly run your portfolio into various market models, before compiling reports so you maintain full visibility over your finances.

[Switch onto our technical abilities...](#)

What is cash flow modelling? [Click here to find out more...](#)



WHY DOES CHARTERED MATTER?

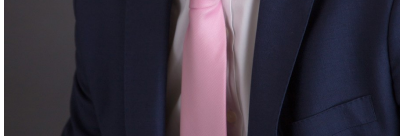
It's a question we hear a lot. We're proud to have Chartered IFAs in the Stratagem Financial Planning team, with the knowledge and experience to ensure you receive the very best advice when it comes to your finances. But what does this mean in practice? It matters more than you might think...

[Get an introduction to Chartered IFAs.](#)

MEET OUR STAFF



Stratagem Financial Planning
Poynton, Bramhall, Stockport, Cheshire

[HOME](#)
[ABOUT](#)
[SERVICES](#)
[NEWS](#)
[CASE STUDIES](#)
[CONTACT](#)
[CLIENT LOGIN](#)


Meet David Shirley

Chartered Financial
Planner

David is a Chartered Financial Planner who takes pride in offering clear, concise and transparent advice. Specialising in pensions, David works closely with clients to help them achieve their financial goals and secure their income through smart forward planning.

in



Introducing Paul Lindfield

Director & Financial
Planner

Paul has been advising owner-managed businesses and entrepreneurs for over twenty years. He brings this corporate expertise to Stratagem Financial Planning, helping business owners protect and grow their venture and lifestyle through personable, comprehensive finance advice. Paul is also working towards his Chartered status. Click here to see Paul's vouched for reviews

in 



David Nicklin

Protection Adviser

David has been involved with the Financial Services Sector for the last 31 years. He progressed through the ranks of various insurance companies before making the decision to become a business owner in 2002 when he formed a financial services practice which he later sold to pursue other interests.

David specialises in complex Inheritance Tax planning scenarios using his knowledge and experience to create robust financial plans.

David's values are to treat everyone as you expect to be treated yourself, listen to and help as many people as you can to get to where they need to be.

MEET OUR STAFF



Meet David Shirley
Chartered Financial Planner



Introducing Paul Lindfield
Director & Financial Planner



David Nicklin
Protection Adviser



STRATAGEM FINANCIAL PLANNING
Poynton, Bramhall, Stockport, Cheshire

[HOME](#) [ABOUT](#) [SERVICES](#) [NEWS](#) [CASE STUDIES](#) [CONTACT](#)

CLIENT LOGIN

< TESTIMONIALS >



Stratagem Financial Planning
Poynton, Cheshire

HOME

ABOUT

SERVICES

NEWS

CASE STUDIES

CONTACT

CLIENT LOGIN

heart of Poynton, Cheshire. We offer clear and concise advice regarding pensions, investments and protection for both your family and your business.

Our Technology
Partner with Us

2019

> Welcome to Stratagem Financial Planning!

Poynton, Cheshire,
SK12 1RD

t: 01625 839 839
e: [info@stratagemwealth](mailto:info@stratagemwealth.com)

© Copyright 2019 Stratagem Financial Planning. Stratagem Financial Planning Limited is authorised and regulated by the Financial Conduct Authority, FCA number 819330 Registered in England, Company number 11456453 Registered Office: 1 Park Lane, Poynton, Cheshire, SK12 1RD The guidance contained in this website is subject to the UK regulatory regime and is therefore targeted at consumers over 18 based in the UK. Any guidance and/or advice contained in this website is subject to UK regulatory regime and is therefore restricted to consumers based in the UK. [Terms and Conditions](#) | [Privacy Policy](#)