



Shaun Dalton
Equity Legal

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Personal Profile

Following five years with the Royal Military Police and Special Investigation Branch joined Hambro Life Assurance in May 1971. After 1977 Manchester Branch Manager for two Life Insurance companies. January 1982 Became part of National IFA Julian Gibbs Associates. 1984, established Flexible Investment Planning Ltd. a National IFA with four regional offices and over forty staff. 2007: Care fees IFA specialist at NHFA (part of HSBC Bank) and Care Fees & Equity Release Specialist at Equity Care, Chartered Financial Planners.

2011 entered legal profession as an Estate Planning Consultant and joined McClure solicitors arranging Wills, Lasting Power of Attorney's, Trusts, and Tax solutions. Qualified as a Barrister Intermediary by examination with Legal Services Guild in 2013 and formed Equity Legal in January 2015 to provide family and corporate estate planning. Services.

Qualifications & Memberships

Financial Services (40 Years Experience)

Chartered Insurance Institute Diploma [Member](#)
Personal Finance Society Diploma [Member](#)

C.I.I. examination passes

FPC 1, 2 & 3
CF2 Investment & Risk
CF6 Mortgage Advice
CF7 Equity Release
HR1 Home Reversions
CF8 Long Term Care Insurance
CII International Award
JO1 CII Personal Taxation
JO2 CII Trusts
CII Award

Legal Estate Planning (14 Years Experience)

Affiliate Member of The Society of Trust & Estate Practitioners

Professional Background

Author Care fees guide.
Founder UK National IFA.
Author UK Investment Guide.
Author Retirement Later Life Guide.
Author International Investment Guide.
Created and produced legal explainer videos.
Designed and implemented financial seminars.
Proven Estate Planning Consultant involving Will & Trusts.
Speaker at Accountant and Solicitor accredited CPD courses.
Retirement course speaker for local government, police, and universities.

Professional Insurance and Regulation

- Professional Indemnity Insurance: up to £2,000,000 per claim.
- Registered under the data protection Act Number: ZA077121

Free initial consultation – Instructions taken on agreed fixed fees.



Qualified
Member
Personal
Finance
Society
Standards. Professionalism. Trust.

