

CHARLIE READING

CHARTERED FINANCIAL PLANNER | ENTREPRENEUR | SPEAKER | AUTHOR



DreamRetirement



Charlie Reading is a Chartered Financial Planner, entrepreneur, speaker and author that has a passion for amazing retirement planning. Amongst his four businesses, he runs the successful Chartered Financial planning practice Efficient Portfolio that specialises in investment and retirement planning and is based in both Rutland and London. Having been in the Financial Services industry since 1999, his qualifications place him in the top 10% of all financial advisers in the UK, with particular focus on investment management, wealth protection and retirement strategies.

Charlie was previously a financial adviser with two of the largest firms of independent advisers in the UK, but he realised that these companies were too product focused and weren't directing their attention to the client's true needs and concerns. When he set up Efficient Portfolio, he wanted to change the focus to a more client centric, truly independent approach so that he could deliver much more value to his client's financial future. He does this using innovative tools like Lifetime Cash-Flow Forecasts.

Charlie has successfully helped many people save for, manage and enjoy their retirement, often when they didn't think they had saved enough. Through careful planning, he has shown them how they can maximise their money, reduce their risk and design an income strategy that delivers the life they desire. But Charlie is also passionate about building a better life through understanding what makes us happy and healthy. What makes our mind tick, and what strengthens our relationships, because ultimately the financial side of retirement is just the starting point.

He loves spending time with his wife and two daughters, playing golf and squash, cycling, travelling and is passionate about scuba diving, safari and good wine.

“CHARLIE’S PRESENTATION MADE ME FEEL LIKE CAREFULLY LOOKING AT MY FUTURE. I WORK AS AN ENTREPRENEUR, BUT THIS DID NOT MAKE ME FEEL GOOD. I USED TO LIVE JUST TO WORK AND WAS STRUGGLING IN LIFE WITH MY EMOTIONS AND HEALTH ISSUES; BEING OVERWEIGHT AND STRESSED CAUSED ME PHYSICAL AND MENTAL ANGUISH.

BUT NOW I HAVE CHARLIE AS A TRAINER AND I AM A COMPLETELY DIFFERENT PERSON. ALL THE PIECES OF MY LIFE HAVE COME TOGETHER AND HELPED ME TO BE WEALTHY, FOCUSED AND MOST IMPORTANTLY, HAPPY. I OWE ALL OF THIS TO CHARLIE.”

ERNST- JAN PFAUTH

*Entrepreneur
Nederlands*

“BEFORE I ATTENDED CHARLIE’S WORKSHOP I HAD A LOT OF RESISTANCE; I WAS SCARED OF THE WORD ‘RETIREMENT’. THE WORD JUST MADE ME PICTURE OLD, UNHEALTHY PEOPLE, WASTING AWAY. NOW, THANKS TO CHARLIE, THE WORD HAS BEEN REDEFINED AND NOW CONNOTES A MORE PURPOSEFUL AND EMPOWERED FUTURE. THANK YOU CHARLIE!”

NADINE HORN

*Adventurer and Running Bio- Mechanics Consultant
Germany*

As seen on...

CBS NEWS

FOX



The Journal
Today's Voice of the North

THE HUFFINGTON POST

LBC 97.3 FM
London's Biggest Conversation
Proud to serve London for
40 YEARS

citywire

BBC RADIO SOLENT

Rutland Times





SPEAKING TOPICS

9-STEPS TO A DREAM RETIREMENT (60 MINS).

IN THIS LIVE EVENT, YOU WILL LEARN...

1. The 9 areas of retirement unhappiness.
2. Why people run out of money in retirement.
3. How to afford a dream retirement.
4. Secrets to truly enjoying your retirement.
5. How to remain healthy in all aspects of life.

PROTECTING YOUR WEALTH FOR YOU AND YOUR LOVED ONES (C45MINS).

IN THIS LIVE EVENT, YOU WILL LEARN...

1. Minimise the amount of Inheritance Tax your loved ones pay.
2. Ensure your assets go to who you want.
3. Protect your assets from the daughter or son in law from hell.
4. Ring fence your wealth from the cost of long term care fees.
5. Minimise the financial damage of a divorce in the family.

BUILDING A PERSONALITY BUSINESS (C45MINS).

IN THIS LIVE EVENT, YOU WILL LEARN...

1. Turn your leader into an industry personality, to generate more leads.
2. Become the go-to expert.
3. How to create WOW in your business, so you generate more leads.
4. Improve your marketing by 'Starting with Why'.
5. Deliver more value through DOS.

CREATE MORE FREE TIME, MONEY AND FUN IN YOUR BUSINESS (C45MINS).

IN THIS LIVE EVENT, YOU WILL LEARN...

1. How to organise your business so you can work fewer hours whilst achieving much more.
2. How to create a more profitable business.
3. How to restructure your business so you enjoy working in it even more.
4. How to create WOW in your business, so you generate more leads.
5. How to build a business you can sell.



SPEAKING TOPICS

FREE DREAM RETIREMENT MASTERCLASS WITH AUTHOR CHARLIE READING

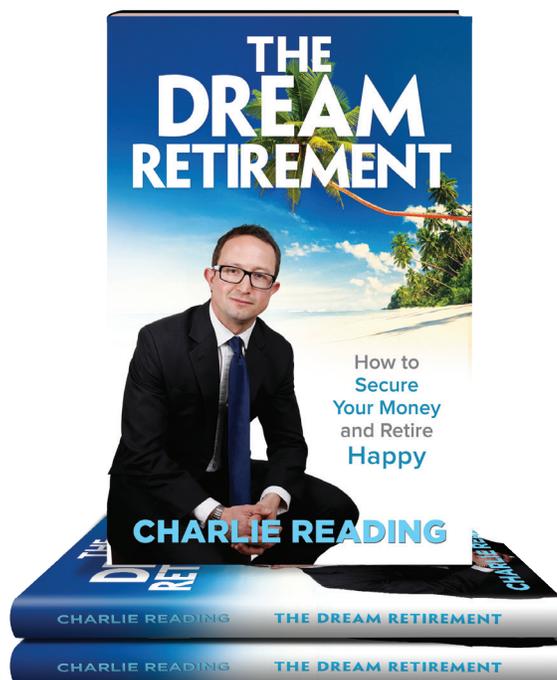
THE DREAM RETIREMENT MASTERCLASS WILL SHOW YOU:

1. How to manage and forecast your finances, so that you can clarify the amount you will need to last throughout your retirement.
2. How to reduce the amount of risk you take with your wealth, whilst increasing the return you receive.
3. Ways to boost your income in retirement, so that you can facilitate all of your hopes and dreams.
4. The best way to structure your time and build your own Bucket List, enabling you to fill your retirement with the activities you love.
5. Health and wellbeing techniques that will help you to build a balanced lifestyle, enabling you to live a happier healthier and longer life.

BY THE END OF THIS PRESENTATION, YOU WILL:

1. Understand how to build a retirement that leaves you feeling energised, fulfilled and secure.
2. Manage and forecast your finances so you have the confidence to live out the life of your dreams.
3. Build a balanced lifestyle filled with reward and achievement.
4. Ensure your body and mind allow you to live out a long and happy new life.

“DON'T SETTLE FOR 'BATTLESHIPS' INSTEAD OF 'CRUISE SHIPS'. WITH CAREFUL PLANNING, BOTH FINANCIAL AND PERSONAL, YOU CAN BUILD THE NEW LIFE OF YOUR DREAMS.”



To book Charlie Reading as a speaker for your event give him a call on +44 (0) 1572 898 060 or send him a message at hello@dream-retirement.com