

Daniel (Dan) Kitchen is a representative of St. James's Place through Optimum Wealth. Based in Oxford, Dan provides bespoke wealth management solutions to both private and business clients.

Dan has worked exclusively in the Financial Services sector for over 25-years and has built up a broad and extensive knowledge. He can provide expert advice on all aspects of financial planning that will evolve over a client's lifetime. Dan's focus is on building a long-term relationship with his clients, providing financial security and peace of mind that their financial affairs are being looked after and regularly reviewed.

As a representative of St. James's Place, Dan has access to their distinctive investment management approach and clients know they have the backing and re-assurance of investing with an award-winning FTSE 100 company.

Key areas where Dan can help include:

- Investment Expertise - Build wealth through the distinctive St. James's Place approach to investment management.
- Pre-Retirement Pension Planning - Review your existing arrangements, plan for the future making use of tax efficient vehicles.
- At Retirement Pension Planning - Advice on your options at this important time.
- Financial Protection - Working with you and your family to protect against the financial effects of premature death or serious illness.
- Inheritance Tax Planning - Organising your affairs to minimise the amount of tax paid by your estate.

Find out more at [www.sjpp.co.uk/optimumwealth/](http://www.sjpp.co.uk/optimumwealth/)

*The Partner Practice represents only St. James's Place Wealth Management plc (which is authorised and regulated by the Financial Conduct Authority) for the purpose of advising solely on the Group's wealth management products and services, more details of which are set out on the Group's website [www.sjp.co.uk/products](http://www.sjp.co.uk/products). The title 'Partner Practice' is the marketing term used to describe St. James's Place representatives.*

*The value of an investment with St. James's Place will be directly linked to the performance of the funds selected and may fall as well as rise. You may get back less than the amount invested.*

*The levels and bases of taxation, and reliefs from taxation, can change at any time and are generally dependent on individual circumstances.*

## Why Business Networking

"I have always recognised the need for networking however, as my business has matured I have been able to establish a much clearer understanding of the clients I really want to work with. For me, I am looking for the right client with the right profile that I can add value to. A professional and well-run networking organisation provides this and is essential to the growth of my business."

- Dan Kitchen



"It's not often that you get the chance to work on a pension plan worth £2million, but Opendoorz has delivered me exactly that opportunity."

## Why Opendoorz

From the outset of establishing his business, Dan has recognised the need for networking. During this time, the only real choice was to take a membership with BNI and Dan was actually instrumental in establishing the Oxford Chapter. However, as the group developed it was clear that Dan's ideal client was not going to be sourced through this channel. He was approached by Cathy Dunbabin (one of the Opendoorz Directors) who explained she would shortly be launching a new networking group aimed at experienced professionals, business owners, directors and senior professionals. Dan and Cathy had known each other for around 20-years so Dan was not only one of the first members to join Opendoorz but he was also delighted to be used as a sounding board when meeting structures and membership plans were being developed.

## The Opendoorz Approach

Dan has seen first-hand the growth of Opendoorz, "I feel very lucky to have been involved from day 1. Like any successful business, Opendoorz has been through some transitional periods. They have tweaked the format since conception but now have a working model that ticks every possible box that you could want from a networking group. The members are all Senior Business professionals who support one another, challenge each other when necessary and look to develop business contacts when the opportunities arise. The events are structured in a productive format and after each meeting I always come away with a positive mind set feeling rejuvenated for the coming days."

## The Results

Dan continues, "my experience of Opendoorz has been excellent, this is reflective of the fact that I am in to my seventh year of membership. Yes, I have made good business connections that have resulted in the generation of new business, however I have also developed some very good friendships. On top of this I have never once felt that attending the meetings was a burden on my time, I always know they will be productive and very rewarding. If you ask me to highlight the one key benefit of Opendoorz, it is the opportunities created which have resulted in ongoing retainer work with clients, the best possible type of business. It has also encouraged me to develop new business contacts, for example Solicitors are an excellent introducer but building relationships with them can often be a slow process, however thanks to Opendoorz I have been able to build some great partnerships, which have been incredibly rewarding.



Opendoorz is unlike any other networking group; in fact we prefer to see ourselves as a professional business network. We help you build a trusted network of introducers, strategic partners, suppliers, mentors and friends, offering expert guidance, inspiration and a dose of laughter and fun along the way.

Call: 01865 565333 • E-mail: [opportunities@opendoorz.biz](mailto:opportunities@opendoorz.biz) • Visit: [www.opendoorz.biz](http://www.opendoorz.biz)