



07894 983040

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South West based

Qualifications

CII Advanced Diploma 80 credits

- AF1 Tax & Trust Planning (30)
- G20 Personal Investment Planning (30)
- AF7 Pension Transfers (20), Certificate in Pension Transfer Advice
- AF8 Retirement Income Planning (currently studying, 30)

CII Diploma 130 credits

- R01, R02, R04, J01, J02, J05 & SV1

CII Certificate 60 credits

- CF9, FP1(16), FP2(16), FP3(18)

Experience

Paraplanning

- Writing detailed and bespoke reports for advisers
- Producing Illustrations
- Carrying out research on existing plans and proposals
- Liaising with clients understanding their needs and objectives

Wealth Development Manager (Provider)

- Understanding adviser firms and how their needs can be best met
- Providing bespoke solutions for advisers
- Providing the necessary Technical Support
- Assisting with complex cases
 - Trusts, Estate Planning, In-Specie Transfers

Platform Development

- Liaising with advisers to understand their needs from a platform
- Working with developers to ensure platform met adviser needs
- Undertaking training of platform staff

Offshore Investments

- Undertaking visits to offshore investment entities
- Negotiating terms and charges for bespoke clients
- Liaison to ensure good outcomes for UK based clients

Remediation & S166 work – National IFA

- Reviewing Offshore Bonds, Estate Planning solutions
- Providing feedback to the business as to my findings
- Assessing remediation requirements for Unsuitable cases

Skills

Relationship Management

- Building trust with colleagues and clients alike
- Passionate in creating an outstanding client service

Tenacity

- I take ownership of problems - see solution through to the end

Cashflow Forecasting

- A real focus and passion
- Illustrating solutions to meet needs and objectives

Organised

- Allows me to work to tight deadlines
- Deliver work in a clear, precise and timely fashion

Creative Solutions

- Developing and designing bespoke solutions for clients

Team Working

- Building a rapport with others
- Improving communication
- Making sure all members feel valued and appreciated

A Bit About Me....

Best Part Of My Life

- Being a Mum of two fantastic children

How I Spend My Time

- Always at the beach! Yoga and running

Greatest Achievements

- Personal – Completed DiveMaster training in French Polynesia
- Professional – Re-starting career & taking exams after having children