YOUR [SENIOR PLANNER’S] PROFILE

YOUR

PHOTO HERE

**Name:** XXXX

**Role:** XXXX

**Contact:** e mail

**Mobile:** 07XXX XXXXXXX

**Other contacts:** [insert Skype / twitter / LinkedIn / website]

**Overview**

[[XXXX] has more than [XX] years of financial services experience, in roles ranging from [XXXX] to [XXXX].

[XXXX] has:

* Experience in core advice areas, as well as specialism in [XXXX] (e.g. – mortgage, wealth advice areas)
* Achieved [Personal Finance Society Diploma Level / Certified Chartered / CeMap / Advanced etc.]
* Is a member of [The Institute of Financial Planning / Personal Finance Society etc.]
* Has a network of specially selected experts to support your advice needs
* Worked across all client areas and specialises in working with [private clients / corporate clients / SME / lawyers]
* Built a solid network of clients from Small & Medium Size enterprise businesses, to national firms, networks, and insurance companies, presenting at many of their annual national conferences
* Interests in [insert relevant Interests and charities out of work?]

**Specific Skills:**

* Investment and pre-retirement planning
* Near and post retirement planning
* Inheritance taxation
* Personal taxation self-assessment

# *“INSERT YOUR MOST APPROPRIATE TESTIMONIAL HERE – consider more than one depending upon the initial area of enquiry. If used at review, consider using as a prompt for a testimonial, and a reason to nudge for referrals”.*

Consider having 3 different ones for different client types / sources of clients