

Members in the news



MATTHEW CLARK

Matthew Clark of Chartered Financial Planners and Discretionary Fund Managers, Seabrook Clark, was the recent cover star in Citywire's Income+ magazine. The practice, which was set up in 2013 and is growing strongly, has a successful joint venture with a local firm of solicitors. The firm's Exeter office (it also has a London office) is conveniently situated in the Greenkeeper's Cottage, adjoining the country house and estate which is now the Exeter Golf Club. Matthew's qualifications include FPFS, TEP, CFP and IMC.



PAUL BEASLEY

Paul Beasley, Managing Director of Chartered Financial Planners, Richmond House Financial Services Limited, based in Stevenage and Milton Keynes, has been making headline news with his petition calling for an independent review of the FSCS Levy. With over 700 signatures, he is asking the FCA to use the financial advice market review to bring professionalism and co-operation to the advisor/Regulator relationship. He is calling on fellow advisers to get behind APFA to achieve the ultimate goal of having an owner managed advisory business represented at FCA committees contributing to strategy.



IVAN LYONS

Ivan Lyons is the Managing Director of Chartered Financial Planners, Investment Solutions Wealth Management Ltd in West Sussex, a 100 Top New Model Adviser firm, since 2013. The firm is the highest rated IFA in Sussex on VouchedFor.co.uk and were featured in the Sunday Telegraph in September 2015. It has been trading for 27 years and is currently on target to exceed £1.65 million revenue and assets under management of £250 million. A bespoke advice service is provided to all clients which does not involve using model portfolios or DFMs. In recognition of its record year, the firm's employees and their partners are looking forward to a long spring weekend in Madrid next year, with Ivan running his 95th marathon.



ALASTAIR WHITEHEAD

Alastair Whitehead is a founder director of Chartered Financial Planners Ergowealth based in Marlow, Bucks. A start-up in January 2014, Ergowealth now has six fee earners and nine support staff providing long term multi-generational financial planning to around 300 private clients in relation to £160 million of invested assets. Operating an outsourced CIP with a philosophy of risk management through diversification, the business focus is on developing its client base through a growing network of introducer relationships which it is building with professional firms along the M4 corridor from Maidenhead to Bristol. Significant expansion is planned and the firm is now actively recruiting experienced chartered advisers, and has just launched a graduate recruitment programme with the first two recruits joining in October.



COLIN LOW

Kingsfleet Wealth, Chartered Financial Planners, has just celebrated its 5th anniversary in business. As part of the anniversary activities, the firm recently held an afternoon tea for clients. It also hosted a celebratory breakfast and lunch for 60 of their professional introducers when Colin Low, Managing Director and Chartered Financial Planner, and SIFA's Ian Muirhead gave short talks on the subject of due diligence for referrals. Colin was able to draw on the research he had carried out for his Masters' Degree in Financial Planning, where he had researched the subject whereas Ian presented the regulatory issues of referrals raised by the Legal Services Act.