

CURRICULUM VITAE

Michaela Ryan PFPS
Chartered Financial Planner

personal
financial
planning



Education and Professional Qualifications:

1990 – 1995	Montgomery High School, Blackpool
1995 – 1997	Blackpool & The Fylde College, Blackpool NVQ Level 3 Business Administration
2005	CII Financial Planning Certificate
2006	IFS Level 3 Certificate in Mortgage Advice and Practice
2008	IFS Level 3 Certificate in Regulated Equity Release
2010	CII Certificate in Life and Pensions CII Level 4 Diploma in Financial Planning
2011	CII Level 6 Advanced Diploma in Financial Planning Chartered Financial Planner status
2020	STEP Certificate for Financial Services
2022	CII Level 4 Diploma in Regulated Financial Planning
2022	Fellowship of the Personal Finance Society
2024	J10 Discretionary Investment Management

10 Riversway Business Village
Navigation Way
Ashton-on-Ribble
Preston, PR2 2YP

Tel: 01772 776 990

E: enquiries@pfp.co.uk

Authorised to provide independent financial advice: FSA reference MXG01656

Employment Details:

Company: Personal Financial Planning Limited

Position: Consultant

Period: July 2022 to date

Company: Personal Financial Planning Limited

Position: Trainee Consultant

Period: May 2019 to July 2022

Company: Personal Financial Planning Limited

Position: Paraplanner

Period: September 2013 to May 2019

Company: Travis Yates IFP Ltd

Position: Administrator/Paraplanner

Period: July 2007 to August 2012

providing expert independent financial advice to personal injury claimants

www.pfp.co.uk

Personal Financial Planning Limited is Authorised and Regulated by the Financial Conduct Authority.

Registered in England No. 3836346 Registered office: St George's Court, Winnington Avenue, Northwich, Cheshire, CW8 4EE

Company: Appletree Financial Solutions

Position: Consultant

Period: April 2006 – June 2007

Company: Travis Yates IFP Ltd

Position: Administrator

Period: February 2003 – March 2006

Company: Alexander Walker IFP Ltd

Position: Administrator

Period: January 1998 – January 2003

Relevant Experience:

- Since joining PFP, Michaela has undertaken a comprehensive training and induction programme in order to specialise in providing Independent Financial Advice to recipients of Personal Injury awards.
- Involved in providing Financial Advice to recipients of Personal Injury awards since joining PFP in 2013.
- Continual Professional Development entailing a minimum of 35 hours of logged CPD-related knowledge, skills and training annually.
- Achieved the Chartered Insurance Institute 'gold standard' Chartered Financial Planner qualification status in 2011.
- Became a Fellow of the Personal Finance Society (FPFS)
- Involved in providing Financial Advice to recipients of Personal Injury awards since 2015 and has experience working in both Private Bank and Independent Financial Adviser businesses.
- Achieved the Chartered Insurance Institute 'gold standard' Chartered Financial Planner qualification status in 2015.
- Became a Fellow of the Personal Finance Society (FPFS).



Chartered
Insurance
Institute
Standards. Professionalism. Trust.

Statement of Professional Standing

Mrs Michaela Ryan

FCA Individual Reference Number:

MXG01656

People must either be approved by the Financial Conduct Authority (FCA) or be certified by their employer before giving financial advice. You can check if this person is approved by the FCA to give advice, or if they are certified by their employer to give advice, by going to register.fca.org.uk/s/ and searching with their individual reference number as shown above.

The Chartered Insurance Institute (CII) has issued this statement to the above named adviser. The CII has checked that the adviser meets the required qualification standard and confirms the adviser has signed an annual declaration stating that they have kept their knowledge up to date and complied with the FCA Code of Conduct.

Date of issue:

1 November 2023

Valid until:

31 October 2024

Alan Vallance
Chief Executive Officer

The Chartered Insurance Institute (CII) is the premier professional body for the insurance and financial planning sector with over 120,000 members in more than 150 countries. It promotes higher standards of integrity, technical competence and business capability. The person named above is a member of the CII and is bound by a Code of Ethics as a condition of membership. For more information, visit cii.co.uk/memberssearch

CII Permanent Identity Number **001389481L**