



## CURRICULUM VITAE

**Natasha Hellewell**

**Chartered Financial Planner**

### **Education and Professional Qualifications:**

2002 – 2008	Urmston Grammar School
2008	NVQ Level 2 in Business Administration
2012 – 2014	BA Hons 2:1 Financial Services, Planning and Management
2011	CISI Investment Operations Certificate
2015 – 2016	CII Level 3 Certificate in Financial Services
2015 – 2016	CII Level 4 Diploma in Financial Planning
2018	CII Level 3 Award in Long Term Care Insurance
2018	SOLLA Accredited Later Life Adviser
2020 – 2021	LIBF Level 6 Diploma in Financial Advice

### **Employment Details:**

**Company:** Personal Financial Planning Limited

Position: Consultant

Period: January 2023 to date

**Company:** Adroit Financial Planning

Position: Financial Consultant

Period: February 2016 to January 2023

Position: IFA Support/Paraplanner

Period: January 2015 to February 2016

**Company:** Bank of New York Mellon

Position: Valuations Oversight Assistant Manager

Period: July 2013 to December 2014

Position: Reconciliations Oversight Supervisor

Period: December 2011 to June 2013

Position: Valuations Administrator

Period: March 2009 to November 2011

providing expert independent financial advice to personal injury claimants

[www.pfp.co.uk](http://www.pfp.co.uk)

**Relevant Experience:**

- Involved in the providing Financial Advice to recipients of Personal Injury awards since 2015 including claims relating to road traffic accidents, clinical negligence and fatal claims.
- Preparation of expert reports with regard to periodical payments, pension loss and investment advice to the Court.
- Achieved Chartered status with the London Institute of Banking and Finance in 2021.
- Since joining PFP, Natasha has undertaken a comprehensive training and induction programme in order to specialise in providing Independent Financial Advice to recipients of Personal Injury awards.
- Continual Professional Development entailing a minimum of 35 hours of logged CPD-related knowledge, skills and training annually.



# LIBF

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## STATEMENT OF PROFESSIONAL STANDING

This statement of professional standing confirms

**Natasha Hellewell**

FCA Reference Number: NJH01242

holds a qualification that is listed within the Appropriate Qualifications  
section of the FCA (Financial Conduct Authority) Handbook; complies with the  
FCA rules for Continuing Professional Development and  
FCA's Code of Conduct for Individuals.

You should check current FCA advice permissions in the [FCA Register](#).

This SPS is valid for the period 31 July 2025 - 30 July 2026



John Somerville, Director of Financial Services

# LIBF

Verification number: 137663

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