personal financial planning

Unit 6, Whiteside
Station Road
Holmes Chapel
Cheshire, CW4 8AA

Tel: 01270 759 786
E: enquiries@pfp.co.uk

CURRICULUM VITAE

Nicholas Porter
Chartered Financial Planner

Education and Professional Qualifications:

1999 - 2004	Bishop Rawstorne C of E High School
2004 - 2006	Runshaw College, Leyland, Lancashire
2007 - 2011	University of Central Lancashire
	BA Honours Degree in Law
	Post Graduate Diploma in Legal Practice
2015	CII Level 4 Diploma in Financial Planning
2018	CII Level 6 Advanced Diploma in Financial Planning
	Chartered Financial Planner Designation
	Fellow of the Personal Finance Society
2021	Accredited Later Life Adviser (SOLLA)

Authorised to provide independent financial advice: FSA reference NXP15260

Employment Details:

Company: Personal Financial Planning Limited
Position: Consultant
Period: September 2022 to date

Company: True Bearing Chartered
Position: Chartered Financial Planner
Period: June 2019 to August 2022

Company: True Bearing Chartered
Position: Paraplanner
Period: August 2015 to June 2019

Company: 1st Chartered Financial Planning Limited
Position: Paraplanner
Period: May 2014 to February 2015

Company: Porter Leightwood Limited
Position: Administrative Assistant
Period: March 2013 - May 2014

Company: DWF
Position: Paralegal
Period: May 2012 - March 2013

Relevant Experience:

- Since joining PFP, Nick 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.
- Achieved the Chartered Insurance Institute 'gold standard' Chartered Financial Planner qualification status in 2018.
- Became a Fellow of the Personal Finance Society (FPFS) in 2018.

Chartered
Insurance
Institute
Standards, Professionalism, Trust.

Statement of Professional Standing

Mr Nicholas Porter

FCA Individual Reference Number:

NXP15260

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:	Valid until:
1 September 2025	31 August 2026

Matthew Hill
Chief Executive, CII Group

CII Permanent Identity Number 001652510D