



CURRICULUM VITAE

James Ryan Rooney

DipPFS

Date and Place of Birth: 17th May 1978
Halifax, England

Centaur House
Hope Street
Sandbach
Cheshire, CW11 1BA

Education and Professional Qualifications:

1989 – 1994	The Brooksbank School, Elland
1994 – 1996	Huddersfield New College, Huddersfield
2000	Securities Representative
2007	Certificate in Financial Planning
2012	Diploma in Financial Planning
2016	STEP Certificate for Financial Services (Trusts and Estate Planning)
2018	CISI Islamic Finance Qualification

Tel: 01270 759 786
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Authorised to provide independent financial advice: FCA reference JRR01048

Employment Details:

Company: Personal Financial Planning Limited
Position: Consultant
Period: June 2020 to date

Company: Sedulo Wealth Management
Position: Financial Adviser
Period: December 2018 to June 2020

Company: Personal Financial Planning Limited
Position: Paraplanner/Consultant
Period: June 2008 to December 2018

Company: Taylor Withers & Company
Position: Financial Adviser
Period: January 2008 – June 2008

Company: Aegon
Position: Consultant
Period: June 2006 – January 2008

Company: Sesame Bankhall
Position: Credit Risk Analyst
Period: June 2005 – June 2006

providing expert independent financial advice to personal injury claimants

www.pfp.co.uk

Employment Details (continued):

Company: TD Waterhouse Investor Services
Position: Investment Representative
Period: January 1999 – June 2005

Relevant Experience:

- Involved in providing specialist Independent Financial Advice to recipients of Personal Injury awards since 2008.
- These have included road traffic accidents, clinical negligence and also fatal accident cases.
- The awards have ranged from less than £10,000 to over £14.5 million.
- Portfolios enacted on behalf of Claimants have included periodical payments, Unit Trusts, Open Ended Investment Companies, Government Stocks, deposit-based investments and liaison with individual stock brokers.

References can be provided upon request.



Chartered
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Institute
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Statement of Professional Standing

Mr James Rooney

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 Statements of Principle and Code of Practice for Approved Persons (APER).

Date of issue: **1 August 2020**

Valid until: **31 July 2021**

Siân Fisher BA (Hons), ACII
Chartered Insurance Practitioner
CEO, Chartered Insurance Institute

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 **001453178B**

