



CURRICULUM VITAE

Natasha Hellewell

Chartered Financial Planner

Centaur House
Hope Street
Sandbach
Cheshire, CW11 1BA

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

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

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

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.

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 2023 - 30 July 2024



Mark Heaton, Managing Director, Professional Education

Verification number: 106615

This SPS remains the property of the issuer and can be recalled at any time.

You can check this SPS in our [Professional Services Register](#). Advisers can opt out of being included in this register.

Registered in England. Registered No. 13621269

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