

CURRICULUM VITAE

Ian Phillip Rowe

Date and Place of Birth: 25th January 1974
Hillingdon, England

personal
financial
planning



Education and Professional Qualifications:

1985 – 1990	Abbotsfield High School, Hillingdon
1990 – 1992	Abbotsfield, Sixth Form College, Hillingdon
1996	Financial Planning Certificate (FPC)
2010	Award in Long Term Care Insurance
2012	Diploma Personal Finance Society (DipPFS)
2016	STEP Certificate for Financial Services (Trusts and Estate Planning)

Centaur House
Hope Street
Sandbach
Cheshire, CW11 1BA

Tel: 01270 759 786
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Authorised to provide independent financial advice: FSA reference IPR01014.

Employment Details:

Company: Personal Financial Planning Limited
Position: Consultant
Period: May 2007 to date

Company: Progress Financial Planning Limited
Position: Consultant
Period: July 2004 – April 2007

Company: Clerical Medical Investment Group
Position: Senior Consultant
Period: May 2002 – July 2004

Company: Zurich IFA Group
Position: Consultant
Period: April 1999 – May 2002

Company: Abbey National Plc.
Position: Financial Planning Adviser
Period: October 1993 – Jan 1997

providing expert independent financial advice to personal injury claimants

www.pfp-planahead.co.uk

Relevant Experience:

- Involved in providing specialist Independent Financial Advice to recipients of Personal Injury awards since 2004.
- These have included road traffic accidents, clinical negligence and also fatal accident cases.
- Involved in providing Independent Financial Advice to a wide range of recipients of Personal Injury damages.
- The awards have ranged from less than £10,000 to over £6.5 million.
- Preparation of expert reports on the statutory responsibilities of the NHS and Local Authorities.
- Portfolios enacted on behalf of Claimants have included Investment Bonds, Unit Trusts, Open Ended Investment Companies, Government Stocks, deposit-based investments and liaison with individual stockbrokers.
- Specialist use of Trusts in Personal Injury cases.
- Provided training to Law firms on the considerations of lump sum settlements versus periodical payments.
- Successfully conducted Upper Tier Tribunal appeals in relation to the misapplication of benefit regulations on behalf of Claimants.
- Acted as advocate for service users in relation to Section 47 Care Assessments.

Notable Cases:

- *KQ v SSWP(Is) [2011] UKUT 102 (AAC);[2011] AACR 43*
- *AA v Huntingdonshire District Council [2017], Valuation Tribunal – 0520M202653/CTR/1 [Council Tax Reduction Appeal]*
- *KL v Wigan Metropolitan Borough Council [2017], First-Tier Tribunal – SC244/17/00895 [Housing Benefit Refusal Appeal]*

References can be provided upon request.



Chartered
Insurance
Institute
Standards, Professionalism, Trust.

Statement of Professional Standing

Mr Ian Rowe

FCA Individual Reference Number:

IPR01014

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 February 2024

Valid until:
31 January 2025

Gill White CDir, FIOD, FCIPD
Acting 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 001282590G