



## CURRICULUM VITAE

Nicholas Porter

Chartered Financial Planner

Centaur House  
Hope Street  
Sandbach  
Cheshire, CW11 1BA

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

### 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 NXPI5260

### 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:** 1<sup>st</sup> Chartered Financial Planning Limited  
**Position:** Paraplanner  
**Period:** May 2014 to February 2015

providing expert independent financial advice to personal injury claimants

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

**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/](https://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 September 2023

Valid until:

31 August 2024

Alan Vallance  
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/membersearch](https://cii.co.uk/membersearch)

CII Permanent Identity Number 001652510D

