

“A Financial Planner’s role is primarily about planning and not about selling financial products



Paul Gibson

Chartered Financial Planner
Certified Financial Planner™
Chartered Wealth Manager
Fellow of the Personal Finance Society

Career

Paul has held senior positions with banks, accountancy firms as well as local and regional IFA firms.

He received Chartered Financial Planner status at the inaugural ceremony held at London’s Guildhall in 2006. This prompted him to move to London to live and work for over five years.

He is one of the few advisers who also holds Certified Financial Planner status – the CFP™ certification is the only globally recognised mark of professionalism for Financial Planners.

Qualifications

Having attained the benchmark Financial Planning Qualification back in 1996 he has passed further qualifications in order to improve the service he offers to clients within the following disciplines:

- Personal Investment Planning
- Taxation and Trusts
- Pensions
- Savings and Investment
- Business Financial Planning
- Supervision and Sales Management
- Pensions Simplification
- Long Term Care

Paul Gibson is a multi-award winning Chartered Financial Planner with over 25 years’ experience.

He brings with him a wealth of technical knowledge and specialist financial planning expertise and aims to establish long-term relationships with a select number of clients.

Awards

Whilst technical qualifications are clearly important, Paul has successfully demonstrated the application of his skills and knowledge via the FT Money Management awards – widely recognised as the industry ‘Oscars’.

He was the 2015 FT Money Management Financial Planner of the Year when he became the first ever Scottish recipient of the award. He retained the title in 2016 and has also been a category winner or runner-up on seven previous occasions reflecting his many areas of expertise.

What’s important?

Paul believes that a Financial Planner’s role is primarily about planning and not about selling financial products.

Financial planning done properly can answer the big questions such as:

- Can I afford to retire yet?
- How much do I need to save?
- Will I run out of money?
- How much is enough?

If you are planning to invest, first invest in planning. The financial plan should drive the investment strategy and ensure that only the minimum investment risk is taken to achieve your goals and objectives.