

CURRICULUM VITAE

Nicholas Porter

Chartered Financial Planner

personal
financial
planning



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)

Centaur House
Hope Street
Sandbach
Cheshire, CW11 1BA

Tel: 01270 759 786
DX: 15653 Sandbach
Fax: 01270 759 787

Authorised to provide independent financial advice: FSA reference NXP15260

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: 1st Chartered Financial Planning Limited

Position: Paraplanner

Period: May 2014 to February 2015

providing expert independent financial advice to personal injury claimants

www.pfp-planahead.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 Professionals 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/ 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 2024

Valid until:
31 August 2025

Matthew Hill
Chief Executive, CII Group

The Chartered Insurance Institute (CII) is the premier professional body for the insurance and financial planning sector with over 100,000 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/membership

CII Permanent Identity Number 001652510D