



## CURRICULUM VITAE

Nicholas Porter

Chartered Financial Planner

Unit 6, Whiteside  
Station Road  
Holmes Chapel  
Cheshire, CW4 8AA

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 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/](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 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 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/membership](https://cii.co.uk/membership)

CII Permanent Identity Number 001652510D