personal
financial
planning

Unit 6, Whiteside
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# CURRICULUM VITAE

## Natasha Hellewell
## Chartered Financial Planner

### *Education and Professional Qualifications:*

| | |
|---|---|
| 2002 – 2008 | Urmston Grammar School |
| 2008 | NVQ Level 2 in Business Administration |
| 2012 – 2014 | BA Hons 2:1 Financial Services, Planning and Management |
| 2011 | CISI Investment Operations Certificate |
| 2015 - 2016 | CII Level 3 Certificate in Financial Services |
| 2015 - 2016 | CII Level 4 Diploma in Financial Planning |
| 2018 | CII Level 3 Award in Long Term Care Insurance |
| 2018 | SOLLA Accredited Later Life Adviser |
| 2020 - 2021 | LIBF Level 6 Diploma in Financial Advice |

### *Employment Details:*

| | |
|---|---|
| **Company:** | **Personal Financial Planning Limited** |
| Position: | Consultant |
| Period: | January 2023 to date |

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|---|---|
| **Company:** | **Adroit Financial Planning** |
| Position: | Financial Consultant |
| Period: | February 2016 to January 2023 |
| Position: | IFA Support/Paraplanner |
| Period: | January 2015 to February 2016 |

| | |
|---|---|
| **Company:** | **Bank of New York Mellon** |
| Position: | Valuations Oversight Assistant Manager |
| Period: | July 2013 to December 2014 |
| Position: | Reconciliations Oversight Supervisor |
| Period: | December 2011 to June 2013 |
| Position: | Valuations Administrator |
| Period: | March 2009 to November 2011 |

***Relevant Experience:***

- Involved in the providing Financial Advice to recipients of Personal Injury awards since 2015 including claims relating to road traffic accidents, clinical negligence and fatal claims.
- Preparation of expert reports with regard to periodical payments, pension loss and investment advice to the Court.
- Achieved Chartered status with the London Institute of Banking and Finance in 2021.
- Since joining PFP, Natasha 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.

LIBF

# STATEMENT OF PROFESSIONAL STANDING

This statement of professional standing confirms

Natasha Hellewell

FCA Reference Number: NJH01242

holds a qualification that is listed within the Appropriate Qualifications section of the FCA (Financial Conduct Authority) Handbook; complies with the FCA rules for Continuing Professional Development and FCA's Code of Conduct for Individuals.

You should check current FCA advice permissions in the FCA Register.

This SPS is valid for the period 31 July 2024 - 30 July 2025

John Somerville, Director of Financial Services

LIBF

Verification number: 123162



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