

CURRICULUM VITAE

Timothy Martin Farragher FPFS

Chartered Financial Planner

personal
financial
planning



Education and Professional Qualifications:

1994 – 1999	All Saints RCHS Lancashire
1999 – 2001	Bacup and Rawtenstall Grammar School
2001 – 2004	University of Manchester
	BSc Pass Degree Mathematics and Statistics
2007	CII Certificate in Mortgage Advice
2008	Level 3 CII Certificate in Financial Planning
2010	Level 4 IFS Diploma for Financial Advisors
2014	Level 4 CII Diploma in Financial Planning
2015	Chartered Financial Planner status
2015	Fellowship of the Personal Finance Society
2017	STEP Certificate for Financial Services
2024	J10 Discretionary Investment Management

10 Riversway Business Village
Navigation Way
Ashton-on-Ribble
Preston, PR2 2YP

Tel: 01772 776 990
E: enquiries@pfp.co.uk

Authorised to provide independent financial advice: FSA reference TMF01044

Employment Details:

Company: Personal Financial Planning Limited

Position: Consultant

Period: February 2022 to date

Company: Investec

Position: Financial Planner

Period: December 2021 to February 2022

Company: Personal Financial Planning Limited

Position: Trainee Consultant

Period: August 2019 to November 2021

Company: Brown Shipley

Position: Client Associate / Client Manager

Period: July 2017 to August 2019

providing expert independent financial advice to personal injury claimants

www.pfp.co.uk

Personal Financial Planning Limited is Authorised and Regulated by the Financial Conduct Authority.

Registered in England No. 3836346 Registered office: St George's Court, Winnington Avenue, Northwich, Cheshire, CW8 4EE

Company: Brewin Dolphin

Position: Paraplanner

Period: April 2017 – July 2017

Company: Brown Shipley

Position: Paraplanner

Period: March 2015 – April 2017

Company: PM & M Wealth Management

Position: Paraplanner

Period: August 2014 – February 2015

Company: Moore and Smalley LLP Client Services

Position: Client Services

Period: March 2014 – August 2014

Company: Addidi Wealth Limited

Position: Administrator / Paraplanner / Trainee Financial Planner

Period: April 2013 – March 2014

Company: Woodland Financial Solutions

Position: Independent Financial Advisor

Period: January 2012 – February 2012

Company: K & M Financial Advisors

Position: Independent Financial Advisor

Period: January 2008 – November 2011

Relevant Experience:

- Providing a holistic financial planning service focusing on investments, protection and pensions to clients with a wide range of financial circumstances and backgrounds.
- Continual Professional Development entailing a minimum of 35 hours of logged CPD-related knowledge, skills and training annually.
- Since joining PFP, Tim has undertaken a comprehensive training and induction programme in order to specialise in providing Independent Financial Advice to recipients of Personal Injury awards.

- Involved in providing Financial Advice to recipients of Personal Injury awards since 2015 and has experience working in both Private Bank and Independent Financial Adviser businesses.
- Achieved the Chartered Insurance Institute 'gold standard' Chartered Financial Planner qualification status in 2015.
- Became a Fellow of the Personal Finance Society (FPFS).



Chartered
Insurance
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Statement of Professional Standing



Mr Timothy Farragher

FCA Individual Reference Number:

TMF01044

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 November 2023

Valid until:

31 October 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 20,000 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/memberssearch.

CII Permanent Identity Number **001462069J**