



## Curriculum Vitae

**John C Hebblethwaite** APFS CFP  
Chartered Financial Planner  
Managing Director

- One of around 700 Chartered Financial Planners in the UK
- One of around 800 UK Certified Financial Planners
- One of approximately 800 UK Associates of The Personal Finance Society (the life and pensions arm of The Chartered Insurance Institute)
- Specialist in Pension Schemes, Investment Portfolio Management and tax efficient solutions for Individual, Corporate and Trust clients
- Over 20 years experience in pensions, financial services and investment
- Advanced Financial Planning Certificate:
  - G60 – Pensions
  - G70 – Investment Portfolio Management
  - G20 – Personal Investment Planning
  - G30 – Business Financial Planning
  - G10 – Taxation & Trusts
  - H15 – Supervision & Sales Management
  - CF9 – Pensions Simplification
  - CF2 – Investment & Risk
- Qualified as a Registered Representative of the London Stock Exchange
- Expert Witness experience in investment and pension cases
- On the panel of experts for the Financial Times Money Makeover
- Approved Adviser for members of The Universities Superannuation Scheme

Further details can be found on [www.thepfs.org](http://www.thepfs.org) and [www.financialplanning.org.uk](http://www.financialplanning.org.uk)