



**John Hebblethwaite** APFS CFP<sup>tm</sup> MIoD FRSA  
Chartered & Certified Financial Planner  
Chartered Wealth Manager  
Chief Executive Officer

- UK Associate of the Personal Finance Society (the life and pensions arm of the Chartered Insurance Institute)
- Expert in Wealth Management, Pension Schemes (Pension Transfer Specialist), Investment Portfolio Management and tax efficient solutions for Charities, Private Individuals, Corporate and Trust clients
- Approved Adviser for The Universities Superannuation Scheme
- Over 35 years' experience in financial planning
- Statement of Professional Standing (SPS) with the Chartered Insurance Institute
- Qualified as a Registered Representative of the London Stock Exchange
- Expert Witness experience in investment and pension disputes
- On the panel of experts for the Financial Times Money Makeover
- Non-Executive Director – Bishop Grosseteste University
- Institute of Directors Ambassador for Financial Planning and Wealth Management
- Specialist on the Lincoln Diocesan Trust and Board of Finance Assets Committee



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