# GARY MATTHEWS FPFS

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**Chartered Financial Planner**

My professional life commenced in 1986 with one of the 'Big Four' UK Banks. I went on to qualify as a Chartered Banker and an Associate of the Chartered Institute of Bankers in Scotland in August 1993. After a successful career within the banking sector, I took up a position with a national firm of wealth managers and qualified as an authorised investment adviser in 2003.

I have gone on to become a Chartered Financial Planner and a Fellow of the Personal Finance Society (FPFS). I am qualified as a Pension Transfer Specialist, holding the Advanced Diploma qualifications in Pensions and Pension Drawdown and achieved a distinction in the Advanced Pensions Diploma.

Continuing professional development remains high on my agenda and, having achieved the Society of Trust and Estate Practitioners (STEP) Certificate for Financial Services (Trusts and Estate Planning) I am now enrolled on the STEP Diploma programme to further my technical knowledge on trusts and estate planning. I have studied and passed the first of the four papers in the 'Administration of Estates' syllabus.

My Unique Ability® is: "Getting results by applying the highest standards of professionalism; the hallmarks of his work are his self-disciplined manner, effective organisational skills and excellent attention to detail."

My **Kolbe A™ Index** number is **7626**. For further information on the Kolbe A™ Index go to http://www.kolbe.com/

- Investment advice
- Asset allocation
- Investment management
- Relationship Management
- Apportionment & Oversight
- Training & Development
- Compliance & Management
- Regulated Advice & Financial Planning

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## Professional Experience

**DIRECTOR,** 2008 – Present

MATRIX CAPITAL LIMITED – Monkhopton, Shropshire.

Having been initially employed by Matrix Capital Limited, in 2008 I was invited to acquire equity in the business and to take on a role as a company director. This has enabled me to add value in the management and development of the business to its current position as a well-respected and well managed firm of Chartered Financial Planners. This has involved the preparation of a robust working business plan, developing and implementing a marketing plan, client acquisition, recruitment and training of a professional team, business and financial management of the practice.

**INDEPENDENT FINANCIAL ADVISER**, 2005-2008

MATRIX CAPITAL LIMITED – Monkhopton, Shropshire.

I was attracted to Matrix Capital Limited as a result of their commitment to raising standards and to delivering high quality advice and service to clients. They provided the resource and support for me to continue my professional development and in 2007 achieve the Chartered Financial Planner qualification.

**INDEPENDENT FINANCIAL ADVISER**, 2004-2005

CO-OPERATIVE BANK FINANCIAL ADVISERS LIMITED – Stockport, Cheshire.

This role enabled me to develop my knowledge and experience of dealing face-to-face with clients. I was also able to expand my technical knowledge, particularly in the areas of retirement and investment planning – going on to achieve my Advanced Financial Planning Certificate.

**ASSISTANT CONSULTANT**, 2002-2004

MARSH LIMITED - Birmingham.

This was my transition from banking to the financial planning profession. It provided a training framework, which started me on the road to professional qualifications and laid the foundation for eventually attaining Chartered Financial Planner status and then Fellowship in my new chosen career.

My role was integral to the wealth management team at Marsh, where I was involved in client review meetings, technical analysis and the delivery of investment and retirement advice to high net worth clients.

## Professional Development

**Financial Planning Certificate**, 2001 • Chartered Insurance Institute.
**G60 Advanced Pensions Qualification (Distinction)** 2003 • Chartered Insurance Institute.
**Advanced Financial Planning Certificate**, 2004 • Chartered Insurance Institute.
**Chartered Financial Planner (APFS)** 2007 • Chartered Insurance Institute.
**Fellow of The Personal Finance Society (FPFS)** 2011 • Chartered Insurance Institute.
**Certificate for Financial Services (Trusts & Estate Planning**) 2014 • Society of Trust & Estate Practitioners.
**Society of Trust and Estate Practitioners (STEP)** • Affiliate Member
**Society of Trust and Estate Practitioners (STEP)** • Advanced Certificate in Administration of Estates (E&W)

## Personal Interests

In my free time, I enjoy spending time with my family and keep fit and active by playing Racketball. I also enjoy time winding down the roads of Shropshire and mid-Wales on my motorcycle.

## Personal Information

Married to Karen, who is a Deputy Headteacher, with a son, Harry.