

## CURRICULUM VITAE

Ian Phillip Rowe



*Date and Place of Birth:* 25<sup>th</sup> January 1974  
Hillingdon, England

Centaur House  
Hope Street  
Sandbach  
Cheshire  
CW11 1BA

*Education and Professional Qualifications:*

1985 - 1990      Abbotsfield High School, Hillingdon  
1990 - 1992      Abbotsfield, Sixth Form College, Hillingdon  
1996              Financial Planning Certificate (FPC)  
2010              CF8 - Long Term Care Insurance  
2011              Trusts (J02)  
2011              Personal Taxation (R03)

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*Employment Details:*

**Company:**            Personal Financial Planning Limited  
**Position:**            Consultant  
**Period:**                May 2007 to date

**Company:**            Progress Financial Planning Limited  
**Position:**            Consultant  
**Period:**                July 2004 - April 2007

**Company:**            Clerical Medical Investment Group  
**Position:**            Senior Consultant  
**Period:**                May 2002 - July 2004

**Company:**            Zurich IFA Group  
**Position:**            Consultant  
**Period:**                April 1999 - May 2002

**Company:**            Abbey National Plc.  
**Position:**            Financial Planning Adviser  
**Period:**                October 1993 - Jan 1997

**Independent Financial Advisers**

Authorised and Regulated by the Financial Services Authority  
Registered in England Reg. No 3836346  
Registered office St. George's Court, Winnington Avenue, Northwich, Cheshire CW8 4EE

### **Relevant Experience:**

- Involved in providing specialist Independent Financial Advice to recipients of Personal Injury awards since 2004.
- These have included road traffic accidents, clinical negligence and also fatal accident cases.
- Having been involved in providing Independent Financial Advice to a wide range of recipients of Personal Injury damages.
- The awards have ranged from less than £10,000 to over £3.5 million.
- Preparation of reports with regard to periodical payments, indexation and investment advice to the Court and Court of Protection.
- Portfolios enacted on behalf of Claimants have included Investment Bonds, Unit Trusts, Open Ended Investment Companies, Government Stocks, deposit-based investments and liaison with individual stockbrokers.
- Specialist use of Trusts in Personal Injury cases.
- Provided training to Law firms on the considerations of lump sum settlements versus periodical payments.

*References can be provided upon request.*

