



Experience

Having worked in financial services for over 15 years, Peter joined French Duncan in 2015. His previous experience covers a variety of roles, ranging from an Independent Financial Adviser to providing technical support and investigating regulatory complaints.

Peter holds a number of professional qualifications, including the prestigious Chartered Financial Planner designation from the Chartered Insurance Institute.

His current role involves working alongside advisers to help formulate advice, research and providing technical support on various issues. He also helps produce cashflow modelling reports, which enable advisers to model a range of possible scenarios to discuss with clients, forming a major part of the advice French Duncan Wealth Management provides.

Peter acts as an additional point of contact for clients and is proficient in explaining many of the more technical areas in simple and straightforward terms.

Financial Qualifications

- Advanced Diploma in Financial Planning
- Diploma in Regulated Financial Planning
- Diploma in Financial Planning
- Certificate in Financial Planning
- Certificate in Equity Release
- Certificate in Discretionary Investment Management
- Certificate in Mortgage Advice
- Certificate in Life & Pensions

Chartered Insurance Institute Credits Advanced Diploma Level

- AF1 - Personal Tax & Trust Planning
- AF3 - Pension Planning
- AF4 - Investment Planning
- AF5 - Financial Planning Process

Chartered Insurance Institute Credits Diploma Level

- J10 - Discretionary Investment Management
- R01 - Financial Services, Regulations & Ethics
- R02 - Investment Principles & Risks
- R03 - Personal Taxation
- R04 - Pensions & Retirement Planning
- R06 - Financial Planning Practice

Chartered Insurance Institute Credits Certificate Level

- CF1 - UK Financial Services, Regulation & Ethics
- CF2 - Investment & Risk
- CF3 - Financial Protection
- CF4 - Retirement Planning
- CF5 - Integrated Financial Planning
- CF6 - Mortgage Advice
- ER1 - Equity Release
- FP1 - Financial Planning Certificate 1
- FP2 - Financial Planning Certificate 2
- R05 - Financial Protection

Chartered Financial Planning status

French Duncan Wealth Management is regulated by the Chartered Insurance Institute (CII) and has been awarded Chartered Financial Planner status. This is the industry's gold standard for firms of financial planners and confirms that we have satisfied rigorous qualification criteria by retaining highly qualified staff who subscribe to the membership conditions of the CII.

Only the UK's premier financial planning firms qualify for Chartered status as it involves a commitment to continuing professional development and adherence to an industry standard Code of Ethics. You can view the Code at www.cii.co.uk/code. If you wish to know more about how using a Chartered firm can ensure you benefit from the best possible advice, service and support, please do not hesitate to contact us.

