



Experience

Julie has worked in financial services since leaving University in 2006, where she studied for her Financial Services degree at Glasgow Caledonian.

Having joined French Duncan Wealth Management in 2017, Julie works with advisers to provide technical support, helping with research and to assist in the advice process, as well as preparing recommendation reports and client facing documents.

With over a decade of experience within the financial services sector, Julie has built an in-depth understanding of the various types of products available and how these interact with client's needs and expectations. One of her main priorities is delivering a great service to clients and the advisers and colleagues she works with. Julie enjoys the ever-changing world of financial services which allows for constant learning and personal development.

Financial Qualifications

- Degree in Financial Services
- Diploma in Financial Planning
- Certificate in Financial Planning
- Award in Pensions Update
- Certificate in Life & Pensions

Chartered Insurance Institute Credits Advanced Diploma Level

- NSC - Non Specific Credits
- AF3 - Pension Planning

Chartered Insurance Institute Credits Diploma Level

- J01 - Personal Tax
- J03 - The Tax & Legal Aspects of Business
- J04 - Pension Funding Options
- J05 - Pension Income Options
- J06 - Investment Principles, Markets & Environment
- R08 - Pensions Update
- NSC - Non Specific Credits

Chartered Insurance Institute Credits Certificate Level

- CF1 - UK Financial Services, Regulation & Ethics
- CF2 - Investment & Risk
- CF4 - Retirement Planning
- CF5 - Integrated Financial Planning
- 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.

