



Experience

With a career spanning 25 years, the majority of these in professional practice, Zane has amassed a wealth of experience in strategic financial planning and investment management. He has developed a reputation as a forward-thinking professional, able to interact effectively with fellow professional advisers, an attribute made particularly valuable given the recent changes made to the regulatory environment resulting in a fundamental change in the way advisers interact with clients.

Zane has extensive experience in advising clients and their solicitors and accountants about the various financial, legal and tax implications of private wealth matters and specialises in advising the OMB and SME markets, particularly in relation to pensions and property, tax-planning mechanisms, exit and succession planning. He is also skilled in delivering advice to Lottery winners and vulnerable clients, as well as advice to the third sector. Zane is regularly asked to provide second opinion work.

Financial Qualifications

- Fellowship of Personal Finance Society
- Advanced Diploma in Financial Planning
- Award in Long Term Care Insurance
- Certificate in Discretionary Investment Management
- Diploma in Financial Planning
- Certificate in Life & Pensions
- Financial Planning Certificate

Chartered Insurance Institute Credits Advanced Diploma Level

- AF1 – Personal Tax & Trust Planning
- AF2 – Business Financial Planning
- AF4 – Investment Planning
- AF5 – Financial Planning Process

Chartered Insurance Institute Credits Diploma Level

- J01 - Personal Tax
- J02 - Trusts
- J03 - The Tax & Legal Aspects of Business
- J05 - Pension Income Options
- J07 - Supervision in a Regulated Environment
- J10 - Discretionary Investment Management
- R01 - Financial Services, Regulations & Ethics
- R02 - Investment Principles & Risks

Chartered Insurance Institute Credits Certificate Level

- CF1 - UK Financial Services, Regulations & Ethics
- CF3 - Financial Protection
- CF4 - Retirement Planning
- CF5 - Integrated Financial Planning
- CF8 - Long Term Care
- GR1 - Group Risk
- FP1 - Financial Planning Certificate 1
- FP2 - Financial Planning Certificate 2
- FP3 - Financial Planning Certificate 3

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.



Statement of Professional Standing

Mr George Hunter

FCA Individual Reference No:

GJH00009

People must be approved by the FCA before giving financial advice. You can check if this person is approved by the FCA to give advice by going to www.fca.org.uk/register and searching with their FCA individual reference number shown above.

The Chartered Insurance Institute (CII) has issued this statement to the above named adviser. The CII has checked that the adviser meets the required qualification standard and confirms the adviser has signed an annual declaration stating that they have kept their knowledge up to date and complied with the Statements of Principle and Code of Practice for Approved Persons (APER).

Date of issue:

1 September 2017

Valid until:

31 August 2018



Sian Fisher BA (Hons), ACII
Chartered Insurance Practitioner
CEO, Chartered Insurance Institute

The Chartered Insurance Institute (CII) is the premier professional body for the insurance and financial planning sector with over 120,000 members in more than 150 countries. It promotes higher standards of integrity, technical competence and business capability. The person named above is a member of the CII and is bound by a Code of Ethics as a condition of membership. For more information, visit www.cii.co.uk/membersearch

CII Permanent Identity Number 001079538J



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