



Experience

After qualifying as a solicitor, with four years commercial experience in practice, Gavin retrained as a Wealth Manager. Since then he has completed three years practical, hands-on experience dealing directly with a variety of clients. Throughout these two career strands, he has gained great experience enabling him to provide his clients with holistic, structured and effective financial planning solutions based on a thorough understanding of their goals, timescales and circumstances.

In addition to his general practice work, Gavin combines his legal experience with his Wealth Management training to deliver specialist advice in the area of Personal Injury and Compensation Settlements.

Gavin holds the Diploma in Regulated Financial Planning, is a proud holder of a Statement of Professional Standing and is studying towards a Chartered Financial Planner qualification.

Financial Qualifications

Diploma in Regulated Financial Planning

Legal Qualifications

LLB(Hons)

Diploma in Legal Practice

Chartered Insurance Institute Credits

Diploma Level

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

Chartered Insurance Institute Credits

Certificate Level

- 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.



Statement of Professional Standing

Mr Gavin Macphee

FCA Individual Reference No:

GWM01073

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 January 2018

Valid until:

31 December 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 001566212D



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