



Experience

Peter has worked in the financial services industry for over 29 years and has been with French Duncan since 2001, advising both corporate and personal clients alike.

With a 'Statement of Professional Standing' awarded by the Chartered Insurance Institute and as an Associate of the Personal Finance Society, Peter provides a wide range of advice to suit the specific needs of his clients, including: retirement planning for individuals; retirement planning for companies; retirement benefits planning; inheritance tax; investment advice for regular and single premium saving and protection advice for individuals and businesses.

As an Independent Financial Adviser, Peter provides bespoke financial advice always ensuring he understands all objectives and requirements. He will devise a financial plan which includes short-term advice and will continue to monitor and adapt the plan on an ongoing basis.

Financial Qualifications

- Associateship of the Personal Finance Society
- Diploma in Financial Management
- Financial Planning Certificate
- Certificate in Mortgage Advice

Chartered Insurance Institute Credits Advanced Diploma Level

- F10 - Taxation & Trusts
- F20 - Personal Investment Planning
- G60 - Pensions
- H15 - Supervision & Sales Management
- H25 - Holistic Financial Planning
- 550 - Personal Investment & The Financial Services Industry
- NSC - Non Specific Credits

Chartered Insurance Institute Credits Certificate Level

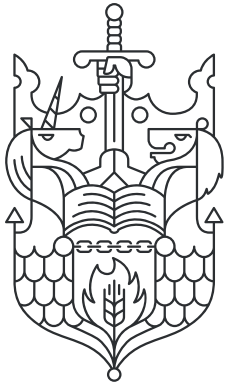
- CF1 - UK Financial Services, Regulation & Ethics
- CF3 - Financial Protection
- CF4 - Retirement Planning
- CF6 - Mortgage Advice
- FP1 - Financial Planning Certificate 1
- FP2 - Financial Planning Certificate 2

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.





Chartered
Insurance
Institute

Standards. Professionalism. Trust.



Statement of Professional Standing

Mr Peter Haveron

FCA Individual Reference Number:

PAH01170

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 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 2018**

Valid until: **31 August 2019**

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 cii.co.uk/membersearch

CII Permanent Identity Number **001062524A**