

WHO WE ARE



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MY STORY

I was brought up with the expression ‘if you can’t afford it you cannot have it’. My parents instilled in me to save money and to never get into debt. As a schoolboy I enjoyed watching my paper round money grow through compound interest and knew I wanted to work in finance when I grew up.

When I was 18, I had a decision to make, to go to university or to go to work. I wanted to earn and learn, and I so applied to Deloitte and Touche as a Tax returns administrator. This was a scheme where young people all aged 18 out of sixth form college were able to gain some work experience and learn from older members of staff in the company.

I enjoyed this experience, but the contract was only temporary and so I needed a permanent

role. I applied to BNY Mellon and managed to secure a job as an administrator. This was a challenging role as I was working on a project which involved building a new software. I was a user development tester making sure the software the IT developers were building was working without bugs and issues in the system. Once the project went live, I worked on opening accounts and transferring stock into and out of the business.

Sadly, my position was made redundant when the role was transferred offshore to India. So, I was back looking for a new challenge and was able to secure an interview at Raymond James Investment Services UK that led to a new opportunity.

Whilst working at Raymond James I interacted with a lot of wealth managers, para planners and financial planners. I realised very quickly I was good at helping people and explaining

how processes worked and what forms were needed for each scenario of stock movements. I studied the IOC (Investment Operations Certificate) exam with the Chartered Institute for Securities & Investment (CISI) which gave me more knowledge of the wider industry and made me hungry for more.

I knew my personality and temperament was well received by the clients I serviced and so I started researching what roles within financial services I would best fit into. I had by now mastered operations, but I wanted to switch to front office as I enjoyed helping people. I quickly found out I wanted to become a

financial planner and so I started the process of researching companies which could help me meet my career goal. Bloomsbury seemed to be a perfect fit as reading through the website I found myself agreeing with the company ethos of the client being at the heart of the service they provide.

When I am not involved in financial planning I enjoy car detailing which involves thorough cleaning, restoration, and finishing of a motor vehicle, to produce a show-quality cleanliness and polish. Not too dissimilar to the time and attention detailed required for financial planning.