

---

# WHO WE ARE

---



**Callum Brown**  
Wealth Planning Assistant

020 4502 4561

[callumb@bloomsburywealth.co.uk](mailto:callumb@bloomsburywealth.co.uk)

[in https://www.linkedin.com/in/callumbrown16](https://www.linkedin.com/in/callumbrown16)

---

## MY STORY

How did I end up here? The answer to that question is that this is what happens when you let curiosity run wild and you finally reach the end of a rabbit hole. But I was not always intrigued. I completed a three-year Finance degree only to find out that I was not interested in most finance-related occupations. So where did the curiosity begin? Well, it started with needing to overcompensate for a poor piece of coursework, the course being Modern Portfolio Theory.

After consulting YouTube for a degree level education, I thought I had stumbled across the holy grail. I had uncovered a content creator who could help me with my course but also relay the information with a visually stimulating approach. After many hours of research and revision, I finished the end of year exam with

unexpectedly high marks, which did lead to some eyebrow raising from a few lecturers.

Fast forward a year; I had finished my degree and had continued my study of evidence-based investing content. It had become an entrenched routine. The content was so enthralling, because instead of learning about theory, I had now started my evidence-based investment journey. I was being taught investing 101s and 102s and it was all substantiated by evidence produced by academia.

After accumulating a plethora of knowledge, I was completely unsure what to use it for. I consulted my brother about my dilemma, and he had the great idea of using my new-found knowledge to help people. A seemingly logical solution to the problem; however, as I have found before, the world is never as straightforward as it seems.



After much procrastination, a family member got me a route into a financial advisory firm, the problem being that the philosophy of the firm was completely antithetical to everything I had spent years learning. Still, it was a great opportunity. Here my ethics were questioned. Should I take this opportunity and provide financial advice which I considered sub-standard and potentially detrimental to the clients in the long term? You will be glad to know the answer was a resounding 'no'.

The aftermath of my decision resulted in a situation that became increasingly complicated, especially to my parents who were becoming increasingly impatient with me to get a job! I needed to find a company that had a philosophy commensurate to my own and unfortunately, I found that at that moment there were fewer evidence-based wealth management firms than there were rolls of toilet paper in my local supermarket during the pandemic.

So how did I find Bloomsbury? Trying to search for an investment firm with an evidence-based philosophy on Google is near impossible but I devised a cunning plan.

After listening to copious amounts of podcasts and YouTube videos, I had become very familiar with a firm called Dimensional Fund Advisers (DFA). For those who do not know, DFA is an evidence-based asset management company; think of Vanguard with maths professors as fund managers.

DFA only works with institutional clients and authorised partnering wealth management firms. I had previously sent a general enquiry email requesting help with my journey but to no avail. I decided to contact them masquerading as a high net worth individual. Eagerly awaiting an email response, I finally got a reply with a list of four wealth management firms which became my shortlist. I think this is what the academics refer to as 'diversification'.

After researching the four companies, I discovered that Bloomsbury was among the first firms to use DFA in the UK and I now had my eyes firmly set on the prize. After a gruelling and intense interview process, I earned the opportunity to join the planning team at Bloomsbury Wealth and am now at the beginning of my journey to provide clients with financial planning and investment advice that I believe is based on sound foundations.