

WHO WE ARE



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MY STORY

As I progressed towards the end of my geography degree at the University of Sheffield, I was struggling with what I wanted to do as a career; the only thing I was sure of was that I had always wanted to help people. I had a conversation with my dad in which he suggested that I might have some of the qualities to be a good financial planner and he suggested contacting Bloomsbury Wealth, as one of the best firms in the field.

I thought about it and kept turning it over in my mind; my dad has always been a financial planner and has always provided for our family, ensuring that we had a nice quality of life and everything that we needed. Although I didn't appreciate it at the time, he has instilled in us

the need to know what you want from life and to work hard to achieve those goals.

I realised that his knowledge and skills meant that we are able to live our lives to the fullest while at the same time knowing our limits and living within our means. Not only does he do this for our family but he is able to pass that knowledge on to many more families. The thought of being able to help lots of people to articulate and work towards their goals and feel financially stable so that they can enjoy their lives was inspiring and hugely appealing to me.

With my dad's guidance I had found a way to help people, perhaps not in a traditional sense but still providing a valuable service which means that every day I am in the privileged position of being part of a team whose whole focus is on helping people to work towards



achieving their goals. At the same time it helps me to acquire the same knowledge for my own life and future family. I have now achieved both my Diploma in Regulated Financial Planning and my Certified Financial Planner qualification.