

WHO WE ARE



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MY STORY

From an early age I was taught to spend only what you have and to save up for things. I remember being given the job of counting the coppers that my parents collected in a large pewter jug and being able to keep whatever didn't make a whole £1. I had a children's savings account for which I was allowed to look after the pass book and I used to pay in my pocket money along with birthday and Christmas money and could see the compound effect of the interest building up in it. I was always interested in ways I could earn money, whether by washing the car, cutting the grass, having a paper round or, in my teenage years, working in a supermarket and in a golf club kitchen.

My parents worked hard to give our family a comfortable life and always saved for the future. However, when they went through a divorce it taught me not to take anything for granted and provided me with the motivation to be self-reliant and more financially aware. It taught me what could happen and to be prepared in life for the unexpected.

After A levels, I decided to go to university and study economics as I had enjoyed the subject and wanted to learn more about how the financial system works and how this can be modelled. I didn't know what financial planning was but I knew that I wanted to work in financial services in some capacity.

After graduating (as unfortunately there were no vacancies for a rock star!), I managed to find a job at a financial adviser specialising

in retirement advice and based in the City of London. At this point I just wanted a job and to avoid ending up working at HMV; however I soon realised that I could make a difference to people's lives by helping them to make informed decisions about their retirement and despite being young, I was able to show clients that I could help them by providing impartial advice which put their needs first.

In my early twenties, my best friend was diagnosed with cancer and this reinforced my view that nothing is forever, that we all need to plan for an uncertain future and being able to enjoy life is very important. He had worked very hard to start his career and was in a position where without an understanding employer, life would have been even more difficult. Thankfully he fully recovered but I decided that I wanted to take what I had learned about retirement advice and add to this by learning how to help people of all ages to plan for their objectives but also to have protection for them and their families if things do not go to plan.

To continue this journey I joined a financial planning firm in the West End of London who shared my desire to provide the best advice possible, to help clients in times of success but also to be prepared when things do not go to plan and be there when help is needed. I was also able to help pass on the knowledge and skills that I had gained to other future financial planners. After 15 years of providing financial planning and assisting in the building of a strong team-based approach, I decided the time was right to join the team at Bloomsbury Wealth. My role at Bloomsbury enables me to develop and continue with my passion for helping families overcome the challenges involved in managing complex affairs and to achieve their personal and financial goals. I also still enjoy mentoring the next generation of financial planners, therefore in my own small way I am ensuring that future generations have access to the benefits of client focused financial planning.