

# WHO WE ARE

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## MY STORY

Born in southeast London, I spent most of my childhood pursuing my passion and obsession – tennis. I trained every day for 11 years and played matches most weekends and school holidays which left little room for anything else. I played at county level for Kent, captained my secondary school team to win the UK Nationals and even represented England twice in an annual inter-European tournament which I won at my second try. Looking back this was an intense lifestyle for a child but it taught me that you only get what you put into your goals and that the most impactful changes can often come from marginal adjustments and refinements to your techniques. Unfortunately, a serious back injury would end my career before it began and left me needing to re-evaluate what I would now do.

I re-joined school in sixth form to complete my A level studies which earned me a place at Lancaster University where I captained their tennis team and would eventually become president of the club. After graduating I travelled through the Asia-Pacific region and had some incredible experiences including a 10km hike along the Great Wall of China, scuba diving with sharks off the barrier reef and with manta rays in Indonesia, climbing Mt. Fuji in Japan and sailing through Ha Long Bay in Vietnam sticking out in my memory.

Knowing this couldn't last forever, I returned home and took a role as a trainee investment manager with Sanlam, South Africa's finance giant. Here I began studying finance in earnest, completing my Investment Operations Certificate (IOC) and Investment Management Certificate (IMC) in my first year while also building my knowledge experience of the sector.



I worked closely with external financial planners to ensure that our investment recommendations were in line with their clients' needs and wants. These discussions taught me that investment was just a small part of a holistic financial plan but I still knew very little about what these other areas were. I began discussing these topics with planners to understand what qualified as a holistic financial plan and was amazed at not only the scope of knowledge needed but also with how involved they were with helping their clients to achieve their goals.

The positive impact financial planners could have on clients' lives stuck with me as my investment role was less interactive and didn't offer the feeling of achievement that comes with improving another's life. After several more months of research, I took the plunge and changed career to become a paraplanner at a small financial planning firm in Croydon where I began my career in financial planning.

After learning the ropes, I moved to Punter Southall Asset Management the next year as a trainee paraplanner. Things started to click for me and within a year I had completed my Diploma in Financial Advice (DipPFS) and was offered a place on the firm's investment committee after working to improve the analytics and processes used by the company for its multi-asset fund panel across the country.

I eventually left Punter Southall to take on a senior paraplanning role at 1825 Financial Planning (now Abrdn). Working for such a large entity showed me the benefits scaling can have in finding cost efficiencies; however it also demonstrated the inefficiencies of

working internally across segmented regional departments within the same process chain. I then joined one of St. James's Place's leading advisers the next year to help with the analysis, collation and presentation of the advice given. I also worked with the compliance director at the adviser's family office practice to create the processes for their investment proposition and was subsequently also asked to join their investment committee.

The company's reputation preceded it and so I was interested to know how things worked at the highest corporate level. I found that while St James's Place's business model is extremely profitable, I did not share in its underlying belief that active management could offer greater value than an appropriately balanced passive investment solution. Indeed, all the data and studies suggested the opposite was true over the long term which, as a believer of facts, was hard to ignore.

As clients will undoubtedly understand, finding a financial planner that is aligned to your beliefs and needs can be a difficult and imposing task. Having now built up a good deal of experience and knowledge of the sector, I had a mental blueprint of the ideal planning practice for me – a client service/outcomes-focused firm that uses evidence-based financial research and theory to create cost-effective holistic planning solutions for its clients. It was also important for me that it had ownership and control of its internal processes as this would allow the flexibility needed to continually adapt to the changing landscape of financial regulation and the evolving needs of clients.

I was therefore thrilled when I got the opportunity to join the Bloomsbury Wealth team as it was known for providing the highest quality of planning and advice but still managed to keep costs low which left more of any potential investment returns in the hands of the clients. I am excited to be working with such knowledgeable and passionate planners and look forward to helping them continue building on their fantastic reputation.