WHO WE ARE

Sophie Sanford DipPFS
Wealth Planning Executive

020 4502 4570
truewealth@bloomsburywealth.co.uk
in https://www.linkedin.com/in/sophiesanford

MY STORY

I have always been interested in understanding people and what shapes the way they think, feel and make decisions. I enjoy learning about what people value, what motivates them and the experiences that influence their outlook on life. In my opinion, this is one of the most important aspects of financial planning. Every client is different and understanding the person behind the numbers is just as important as understanding their financial position.

My interest in financial services began through my Nan and Grandad. My Grandad introduced me to investing through his share portfolio and I enjoyed learning about the reasoning behind the decisions he made. Many of our conversations took place over a cup of tea, reflecting on the events shaping the world around us and exchanging views on their impact. Those discussions nurtured my natural curiosity and sparked a lasting interest in how financial decisions can help shape people's futures and create opportunities.

I started my career as a placement student within stockbroking before moving into pensions, where I gained a greater understanding of the financial planning profession. Working alongside advisers gave me an insight into the real value of advice. What stood out to me was the impact that good planning could have on someone's confidence and peace of mind. I quickly realised that financial planning is about much more than products, investments and tax planning. It is about helping people understand their options, identify considerations they may otherwise overlook, make informed decisions and feel confident about the future.

As my career progressed, I moved into paraplanning and discovered that I particularly enjoyed the problem-solving and technical side of the profession. Every client has their own circumstances, goals and priorities, which makes finding the right solution both interesting and rewarding. I enjoy helping advisers deliver meaningful advice that can make a positive difference to clients' lives.

Joining Bloomsbury Wealth felt like a natural progression because their approach closely aligns with my own values. Putting clients first, maintaining high standards and continually developing my knowledge have always been important to me. The emphasis Bloomsbury Wealth places on long-term client outcomes strongly resonates with me.

For me, the most rewarding aspect of financial planning is helping people make important decisions with greater clarity and confidence. Whether that means helping them achieve an important goal, navigate uncertainty, make a difficult decision or simply feel more reassured about the future, I am proud to play a part in that process.