

## **Education**

### **October 2014 – October 2015: St. James's Place Wealth Management Academy**

Diploma in Regulated Financial Planning (DipPFS)

Certificate in Mortgage Advice (Cert CII (MP))

### **2005 – 2009: The University of Newcastle upon Tyne**

BA Hons in Modern Languages (French, Spanish and German)

### **1998 – 2004: Bolton School Girls Division**

*A-Levels:* French (A), German (B), Business Studies (C), General Studies (B)

*GCSEs:* 10 Subjects (Grade A\* - C) in French, German, Mathematics, Sciences, Geography, Religious Studies, Food Technology, English Language and Literature

## **Professional Experience**

### **October 2015 – Present: Associate Partner at St. James's Place Wealth Management (Self Employed)**

- Running my own business as a Financial Adviser as part of the St. James's Place network
- Providing holistic advice to private clients on Mortgage, Protection, Retirement and Investment planning
- Building strong relationships with clients in order to promote referrals
- Proactive engagement of new prospects and clients in order to grow my business. This involved attending networking events and creating professional referral networks
- Dealing with groups of individuals to educate them on specific areas, such as NHS pension changes or Auto Enrolment

### **February 2012 – September 2014: Fixed Income Analyst at RBS, Manchester, UK**

- Managing the day-to-day activities of the Fixed Income function across all markets for bonds and repos on behalf of French, Spanish, Belgian and Portuguese clients. These included activities such as trade capture, front-to-back reconciliations, client allocation/confirmation and communication with settlement teams for pre-matching and fails management.
- Collaboration with a number of teams across the business such as Traders, Sales Desk, Settlement and Client Onboarding.
- Developed strong relationships with my client list and strived to deliver excellent client service at all times to priority clients.
- Contributed to the culture of process improvement through driving small projects and enhancements.
- Systems used include Bloomberg, Calypso, Omgeo CTM, Tradeweb, MarketAxess and TLM
- Managed team of 5 Analysts when the Manager of the team was unavailable or out of the office.

### **August 2010 – January 2012: European E-Commerce Executive at QC Supplies, Halifax, UK**

- Managing the day-to-day running of five B2B and three B2C sites
- Liaising with the Marketing department to get traffic to the websites by using e-shots and inbox flyers
- Analysing competitors and adjusting our pricing accordingly
- Meeting with different brands to get the best pricing on new or popular products

### **June 2009 – February 2010: European E-Commerce Administrator at QC Supplies, Halifax, UK**

- QC Supplies owns a number of online retailers selling office supplies to UK customers and across Europe.
- My role was to manage their German accounts on Amazon

- Revision of product pricing, in accordance with market demand and competition
- Management of calls and queries from German customers

### **September 2007 – March 2008: Project Manager at Telalangue, Paris**

- Telalangue is a language-learning company that I worked for as part of my Year Abroad.
- Responsible for writing worksheets given to people learning English
- Recorded dialogues for them to use to practice their listening skills
- Proofread documents translated into English by non-native speakers

### **September 2002 – June 2004: Office Assistant at Miller Metcalfe Estate Agents, Bolton, UK**

- Miller Metcalfe is an estate agency, in which I worked as an office assistant on Saturdays and Sundays.

## **Volunteer Work**

### **Oropesa Kindergarten, Peru**

Volunteered at this Kindergarten for 3 months as part of my Year Abroad and helped to control the class of over 30 three to five year-olds. It was extremely challenging, especially with me not being a native speaker and I constantly had to think of new ideas to keep the children entertained, as well as educated

### **Wood Street Mission, Manchester**

This charity is one of RBS's nominated charities and I have volunteered here on a number of occasions as part of the scheme at RBS whereby employees can take 3 days a year to volunteer if they wish to

### **Age UK**

I am a volunteer befriender for the charity. This involves spending an hour a week with an elderly lady in her home to provide conversation, company and a friendly face. It is a role I find highly rewarding and have been doing for around 6 months.

## **Additional Skills and Information**

**Foreign Languages:** French (high level), Spanish (moderate level) and German (moderate level).

**Leadership:** Undertook a daylong leadership course run by the Royal Navy, which involved lectures on different leadership styles and then practical tasks to put them into practice.

**Computer Skills:** Excellent working knowledge of Windows package including Word, PowerPoint and Excel. Able to quickly grasp new and complex systems with minimal instruction as demonstrated on a number of occasions in previous roles.

**Full UK driving Licence:** I have a clean licence, which I have held for 13 years.

## **Interests**

**Travel:** I have been lucky enough to travel to many different and diverse countries. Travelled around France, Spain and Belgium by train to aid my language skills and also lived abroad for my third year at university. In February 2010, I went on a five-month trip of South America, New Zealand, Australia and Thailand, which gave me a great insight into different cultures, broadened my mind and brought me into contact with a wide range of people.

**Skiing:** From going on skiing trips since the age of 6, I have worked up to quite a high level, despite quite a severe accident in 1999, breaking my femur in three places.

**Water-skiing:** I have been water-skiing for the past 14 years and after a lot of practice and hard work I am now also able to mono-ski to a high level.

**Supporting charities:** I have run the Race for Life in aid of Cancer Research; I ran the Great Manchester Run 2014 for local youth charity Bolton Lads & Girls Club and now do a lot of work for the charity Kidneys for Life since a close friend had a kidney transplant last year. I ran the Manchester 10k in 2015 raising over £1000 and last year I cycled 350 miles around the Italian Lakes raising over £2500 for the charity (having never done any long distance cycling previously).

**Socialising:** I enjoy attending different kinds of events and meeting new people. I was on the Social Committee at RBS and assisted in organising varied events such as Wine Tasting, Pub Quizzes and Summer BBQs.

### **References**

Available on request