

HOLLIE COOMER APFS – Chartered Financial Planner for Gould Financial Planning Ltd

Professional Qualifications

Certificate in Financial Administration – 2009

Certificate in Financial Services – 2010

Diploma in Financial Planning – 2012

STEP Certificate for Financial Services - Trusts and Estate Planning - 2015

Advanced Diploma in Financial Planning and Chartered Status - 2016

Professional Background

Hollie joined us in 2007 as an administrator in control of billing and client invoicing. Through hard work and dedication Hollie progressed to a Technical Manager in 2012 having passed the Diploma in Financial Planning. As our most senior paraplanner, Hollie's interests have mainly been in pensions and have helped clients with advice both in retirement and reviews during retirement. Hollie is also the firm's Pension Transfer Specialist and in working closely with Andy Gait, have assisted a number of clients holding Final Salary Pension Schemes.

In 2015 Hollie branched out and passed the STEP Certificate for Financial Services - Trusts and Estate Planning. The certificate increased Hollie's knowledge and understanding of the legal and tax factors of estate planning.

As a testament to Hollie's commitment to continual learning and examinations, in June 2016, Hollie achieved the one of highest accolades recognised by the Chartered Insurance Institute by achieving Chartered Status.

Outside Interests

Hollie is a keen reader and can often be found with her nose in her kindle. Hollie also partakes in a variety of fitness classes at her local gym including boxing, circuits and spin.