

## **NICHOLAS WILLIAMS BSc Dip PFS – Client Wealth Manager for Gould Financial Planning Ltd**

### **Professional Qualifications**

Bachelor of Science in Business Studies - 2008

Certificate in Financial Administration – 2012

Certificate in Financial Services - 2012

Certificate in Discretionary Investment Management - 2013

Diploma in Financial Planning – 2013

### **Professional Background**

Nicholas joined us in November 2011 as an administrator dealing with implementation of applications and general office duties. Through hard work and dedication to the CII exams, Nicholas progressed to a paraplanner and is now an experienced client wealth manager. Nicholas is proficient in writing strategic financial planning reports and conducting client valuation reviews for our existing clients.

Nicholas is currently a member of the Gould Financial Planning Investment Committee and has a personal interest in monitoring financial markets and researching new investment ideas, to add to his experience, Nicholas is currently studying towards the level 7, Chartered Wealth Manager qualification, via the CISI, with whom he is an Associate member.