Phil Smith

Dip PFS, Cert CII Independent
Financial Adviser Director

I am an Independent Financial Adviser and own and manage Hamnett Wealth Management. I have been advising clients for over 27 years and have been with Hamnett Wealth Management since 1996. I specialise in advising clients on areas such as investments, pensions and inheritance tax planning. I have an in-depth knowledge of trusts, pensions legislation and investment planning. I pride myself in taking time to get to know my clients and understanding their individual needs and requirements.

I build lifelong relationships with my clients becoming their trusted adviser in many different areas. With me, what you see is what you get – I am straight talking and offer good advice.

Qualifications:

Diploma in Financial Planning

The Diploma in Financial Planning is an advanced technical qualification which demonstrates an understanding across a broad range of key advisory areas:

CF6 - Certificate in Mortgage Advice (CII)
JO2 - Trusts (CII)
JO4 - Pension Funding Options (CII)
JO5 - Pension Income Options (CII)
R08 - Pensions Update Programme (CII)

Financial Planning Certificate

These are core qualifications providing a grounding in insurance essentials, mortgage advice, mortgage advice and equity release, and life and pensions administration respectively:

CF1 - UK Financial Services, Regulations and Ethics (CII)
CF3 - Financial Protection (CII)
CF4 - Retirement Planning (CII)
CF5 - Integrated Financial Planning 1 (CII)
FP1 - Financial Planning Certificates 1 (CII)
FP2 - Financial Planning Certificate 2 (CII)
FP3 - Financial Planning Certificate 3 (CII)
RO5 - Financial Protection (CII)

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