

Biographical Notes

Brendan O’Ciobhain, APFS

Chartered Financial Planner

Director

Brendan has worked in Financial Services for twenty years, including early advisory roles with MI Group (now City Financial Partners Ltd) and Inter-Alliance. In 2002 he became a partner in Phoenix Wealth Management LLP, which provides the full range of advisory and wealth management services to its City and Berkshire clients. Brendan became Managing Director of the company in 2009.

Brendan has been a member of the Personal Finance Society since its formation and passionately believes in its mission as a professional body. He recognises that RDR is the most significant change to the financial services landscape since the Financial Services Act in 1986 and believes that the PFS has an important role in supporting members in achieving the desired step-change in professional standards. Brendan was elected to the PFS board in September 2010.

Brendan started a charity in 2002 for children with special needs and learning disabilities, which he now runs. The charity, known as Thumbs Up Club, provides holiday camps in Berkshire, and has been accessed by over 200 families to date.

Brendan is in his 50’s and is married with two teenage sons. He enjoys sailing and an occasional game of golf.

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