

## Biographical Notes

### **Edward S Grant, BA (hons), PFPS FinstSMM**

Chartered Financial Planner

#### **President**

Edward Grant has been working in the financial services industry for over 20 years. He is a Chartered Financial Planner, a Fellow of the Personal Finance Society by examination and a Fellow of the Institute of Sales and Marketing Management.

Edward is passionate to support advisers in developing their professional qualifications as they embrace the Retail Distribution Review. He has a breadth of experience working with individuals taking all levels of qualifications from certificate, progressing towards Diploma and Chartered status. This has helped his understanding of the challenges that individuals face. Edward is author of the current 2009 /10 JO1 Tax CII exam preparation course, a postal tutor and a CII examiner.

A past Chairman of the Hertfordshire and Middlesex Life and Pensions Society, Edward became Chairman of the Personal Finance Society London Region in March 2008 having been closely involved with the Society of Financial Planners in the London Region for over 10 years. He was elected to the Personal Finance Society Board of Directors in November 2008 becoming President in September 2010.

Due to his experience in the regions and with qualifications, Edward has focused his efforts on the board to re energize the regions and seeking to enhance the membership support for those seeking to achieve their level 4 diploma qualifications.

He has written a number of tax and trust articles and presents to large and small audiences of advisers, professional connections and clients. Edward's role within Zurich, heading a Wealth Solutions Team enables him to travel across the country meeting a wide range and types of advisers.

Edward began his career in Financial Services as a direct sales consultant for Providence Capitol (Old Mutual). He then moved to Royal Insurance where he worked for the IFA division for 12 years before joining Zurich in 2002 after a period as an IFA.

Edward is married to Marina and has two great children Peter and Francesca. He is a season ticket holder at the Emirates.

Last amended September 2010