

Paul Green, Dip PFS

Independent Financial Adviser

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With experience in the financial services industry stretching back thirty years, I have many skills to offer in advising clients on solutions for their investment plans.

I have held a variety of roles in broker sales and compliance as well as being a retirement specialist with a national firm of advisers. In recent years I have concentrated on pensions and investments, particularly for the 'At Retirement' market.

There have been considerable changes and technological advances during that time but what remains constant is my commitment to providing a first class service, mindful that clients have entrusted me with the management of their hard-earned money.

The value of pensions and investments can fall as well as rise. You may get back less than you invested.

◆ Key Strengths

- Extensive and varied experience
- Conscientious with strong awareness of clients' trust
- Commitment to first class service

◆ Qualifications

- Diploma in Financial Planning, Personal Finance Society
- G60 (Advanced Pensions Exam)

◆ Expertise

- Pensions
- Investments
- Solutions for 'At Retirement' clients

◆ Career Overview

Financial Adviser at Suckling Waddington since May 2015

Providing comprehensive advice in all areas of financial planning to expanding client base

Worked in the Financial Services industry since 1985, beginning as a cashier for Commercial Union and more recently as an adviser for CJL Probate and Financial Services until it merged with Suckling Waddington

Held a variety of roles in between, in broker sales, compliance and retirement advice

◆ Hobbies/Interests

- Keen tennis player in both summer and winter leagues
- Love the outdoor life
- Enjoy keeping fit which mainly involves long walks in the local countryside with our Westie