



Andrew Moat DipPFS ACSI
Financial Planning Technician

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- **Role:**

Andrew is a Financial Planning Technician, supporting the Financial Planners by creating tailored wealth management solutions for our clients and handling client queries. Andrew has worked in the industry for 8 years and has developed an interest in investments and financial markets. He is currently working towards achieving the Certified Financial Planner status.

- **Qualifications:**

BSc (Hons) in Accounting.
Diploma in Financial Planning.

- **Memberships:**

Chartered Institute for Securities and Investment (CISI).
The Personal Finance Society (PFS).
The Chartered Insurance Institute (CII).