



Tom Sadler APP ACSI
Financial Planning Technician

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- **Role:**

Tom is a Financial Planning Technician, supporting the Financial Planners by creating tailored wealth management solutions for our clients and handling client queries. Having worked in the industry for 10 years, Tom is currently working towards achieving Certified Financial Planner status.

- **Qualifications:**

Diploma in Financial Planning.

- **Memberships:**

Chartered Institute for Securities and Investment (CISI).

The Personal Finance Society (PFS).

The Chartered Insurance Institute (CII).