



EXPERT
FINANCIAL
SOLUTIONS LTD

Biography.

Name: - Dominic Spalding

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Professional status: - Fellow of the Personal Finance Society – designation FPFS
Chartered Financial Planner
Resolution accredited IFA

Professional qualifications: - Chartered Insurance Institute qualifications.
Advanced diploma in financial planning
Pension planning AF3
Investment planning AF4
Financial planning process AF5
Taxation and trusts G10
Business financial planning G30
Pensions G60
Pension Investments K10
Retirement options K20
Diploma in financial planning
Personal tax J01
Pension funding options J04
Pension income options J05
Investment principles, markets & environment J06
Savings and investments SV1
Certificate in financial planning
Pension simplification update programme CF9
FPC pre 1994

Career history: - 1st October 2004 to date – Expert Financial Solutions Ltd – Director including roles of Compliance Officer and Pension Transfer Specialist.
May 1999 to 30th September 2004 – Head of Pensions – Edmund Gibbs Financial Services Ltd.
January 1983 to April 1999 – Friends Provident – administration, IFA consultant, corporate account consultant, regional pensions manager.

Authorisation: - Expert Financial Solutions Ltd – FSA registration number 401295
Individual FSA number – DES00027

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