

YOUR WEALTH MANAGER'S PROFILE



Name: Tim Johnson FCCA APFS Chartered Financial Planner
Role: Senior Wealth Manager
Contact: tim.johnson@definewealth.co.uk
Mobile: 07767 823014
Web: www.definewealth.co.uk

Overview

Tim has more than 30 years of experience in the financial services industry with roles ranging from independent adviser to Group CEO.

Tim:

- Has experience in core advice areas with specialisms in wealth management, pension and tax planning
- Has the Advance Diploma in Financial Planning (Level 6)
- Associate Membership of the Personal Finance Society
- Chartered Financial Planner
- Fellow of the Chartered Institute of Certified Accountants
- Has a network of specially selected experts to support your advice needs
- Worked across all client areas and specialises in high net worth private clients and medium to large corporate clients
- Has built a solid network of private and corporate clients
- Won the IFA of the Year award in 1997
- Regularly appeared on TV and Radio as an expert commentator
- Helped the CII develop exams for the financial services industry

Specific Skills:

- Investment and pre-retirement planning
- Near and post retirement planning
- Inheritance Tax Planning
- Estate Planning
- Strategic Employee Benefits advice and implementation
- One to one and one to many communications

Define Wealth is a trading name of Define Financial Planning Ltd which is authorised and regulated by the Financial Conduct Authority.

Registered address: Suite 5, First Floor, Pilgrims Court, 15-17 West Street, Reigate, Surrey, RH2 9BL.

Define Financial Planning Ltd is registered in England & Wales. Registration No: 06547507