

Qualification success for Taylor Patterson staff

TWO staff at Taylor Patterson have completed top financial qualifications.

Phil Rogers, director of the Financial Planning division, has passed the final exam required to complete the Diploma in Financial Planning. The qualification recognises Phil's in depth and technical knowledge of the subject.

Alexa Johnson, corporate insurance adviser, has finished her Diploma in Insurance after completing her Insurance Law module which she passed with distinction.

Gillian Bardin, managing director, praised the pair for completing the difficult qualifications, which will mean they will be able to enhance the level of advice they give to clients.

She said: "Taylor Patterson takes staff training very seriously, and see investing in our staff as important way to make sure our clients get the best possible advice.

"These qualifications recognise the outstanding level of advice Phil and Alexa are able to give to clients, and the experience and knowledge they will be able to pass on to colleagues."

Other members of staff to have completed certain modules in their own qualifications are: Steve Jackson, Edgar Cankalis and Iwan Probert who all passed the Pension Funding Option module of the Diploma in Financial Planning.

Kay Entwistle and Paul Jackson both passed the Pension Income Options module of the Diploma in Financial Planning; Ross Davies and Greg O'Brien the Investment Principles, Markets & Environment module; and Ross Davies who also passed Supervision in a Regulated Environment.

James Thompson passed the Business Financial Planning section of his Advanced Diploma in Financial Planning, and Keith Pressler the Investment Planning module.

Robert Cholmondeley, director of the Corporate Insurance division, passed the Principles of Property Insurances stage of his Advanced Diploma in Insurance.