



## ABOUT:

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David appreciates that in financial services, it is important to believe intrinsically in what you do, as it's an abstract business without manufacture of an actual product. It's important to keep the end result in mind: a job well done and a satisfactory outcome for happy clients. Wealth Design's ethic of caring is more than a cliché, as the aim is to make a genuine difference in people's lives, by means of an active focus on their particular circumstances.

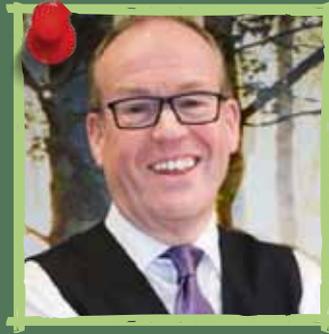
David has been regional chairman for the Personal Finance Society for Staffordshire and Shropshire for over 13 years, chairing quarterly meetings and attending national conference. In a constantly-changing sector, this helps ensure enduring professionalism.

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# DAVID W PHILIPS

Dip PFS - DIRECTOR

## CAREER HISTORY:

David has worked in financial services since 1987, including many years with major names in the sector, with a particular specialism in advice about pensions. With that wealth of national company experience behind him, his mission now is to utilise it in a smaller more personal environment.

## QUALIFICATIONS:

- Diploma in Financial Services
- Stoke on Trent Sixth Form College - A Levels Art and Design - 1972 - 1974
- Holden Lane Junior High School - O Levels - 1967 - 1972

## FUN FACTS:

- David is a 'people person' who cares about clients, colleagues and family.
- Home includes his grandson Toby, so his busy life features going back to a parenting role.
- Outside of work David loves art and drawing, has his own studio at home, enjoys summer workshops and has been successful in competitions.

Wealth Design Limited is registered in England (Company No. 09198203) and is authorised and regulated by the Financial Conduct Authority: FRN No. 647119. Wealth Design Limited is a member of the Personal Finance Society.