



ABOUT

Gemma joined Wealth Design in 2017. Whilst servicing and growing her client base in the Mid Wales/ Shropshire area she diligently undertook all the assessments required to achieve Chartered Status, which she successfully completed in August 2018.

Gemma has worked as a financial planner since 2006. Prior to this Gemma worked for a bank.

CAREER HISTORY

Gemma's empathy, listening skills, ability to explain options clearly and conscientious nature are qualities all valued by her clients.

Gemma appreciates the trusted relationships she has with her clients and thoroughly enjoys her role. She delivers peace of mind as demonstrated by the following client testimonial "I have known Gemma for a number of years and I trust her and feel very comfortable working with her. If something is puzzling me I can pick up the phone and ask without feeling stupid. I find finance mind-boggling and so working with Gemma at Wealth Design is reassuring. I feel much happier knowing that she is looking after my finances. She is much more proactive and knowledgeable than I would be. I feel the advice is well worth paying for."

As well as highly developed soft skills Gemma has the technical knowledge to underpin her recommendations. These include the necessary qualifications to assist clients in respect of the specialist area of pension transfers as she has successfully completed both AF3 (Pension Planning) and AF7 (Pension Transfers).

Gemma Oliver,
APFS
Chartered Financial Planner

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QUALIFICATIONS

- Chartered Financial Planner
- Certificate in Pension Transfer Advice
- Award in Long Term Care Insurance

FUN FACTS

- Gemma loves to cook for family and friends and also enjoys keeping fit. Gemma is married. She and her husband Rob have four children, Tilly, Freddie, Lottie and Henry. Gemma is very sociable and her weekends are kept busy with visits to National Trust properties, trips to the coast and catching up with friends and family.
- Her proudest personal achievement is successfully carrying two sets of twins.
- Gemma's favourite Motto – "Everyone you meet is fighting a battle you know nothing about. Be kind. Always."

ADDRESS

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WEBSITE

www.wealthdesign.co.uk

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