



**David W. Philips,**  
**APFS**  
Director &  
Chartered Financial Planner

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#### ABOUT

It has given David enormous pleasure to see Wealth Design grow from modest beginnings in 2014. 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 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 circumstances.

David was regional chairman for the Personal Finance Society for Staffordshire and Shropshire for 14 years, which involved chairing quarterly meetings and attending national conference. In a constantly-changing sector, this helps ensure enduring professionalism. He is still actively involved in the society.

#### 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

- David has achieved Chartered Status
- PMI Pension Trustee Certificate
- 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.

#### ADDRESS

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#### WEBSITE

[www.wealthdesign.co.uk](http://www.wealthdesign.co.uk)