



ABOUT

Gemma is a Chartered financial planner having achieved Chartered status in 2018. Her empathy, listening skills, ability to explain options clearly and conscientious nature are qualities all valued by her clients. One of her clients explains "Myself and my husband have worked with Gemma for ten years. We think she is excellent and she explains things well and ensures that we understand them."

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).

CAREER HISTORY

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.

Having worked as a financial planner since 2006, Gemma provided financial advice for a high street bank looking after personal, business and high net worth clients. Prior to this she had 3 years banking experience, starting her career as a cashier in 2003 and working her way to management.

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WEBSITE

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QUALIFICATIONS

- Chartered Financial Planner
- Advanced Diploma in Financial Planning
- Certificate in Pension Transfer Advice
- Award in Pensions update
- Award in Long Term Care Insurance

FUN FACTS

- When she was growing up she wanted to be a car designer.
- Outside of work Gemma is very sociable and loves to cook for family and friends. Spending quality family time is very important to her and she enjoys including the children and socialising as a family.
- Gemma is married to Rob and has four children, Tilly, Freddie, Lottie and Henry.
- Her proudest personal achievement is successfully carrying two sets of twins.
- Her ethos is to be good and kind, as a mother, wife and friend.
- Gemma's favourite Motto – "Everyone you meet is fighting a battle you know nothing about. Be kind. Always."