Qualifications and Accreditations

Michael Harvey

B.Sc. (Hons), APFS, Cert CII(MP)
Director and Chartered Financial Planner

"Creating bespoke financial plans and delivering better outcomes for my clients and their families is hugely rewarding."

Michael has successfully completed an impressive array of qualifications, including the Chartered Insurance Institute's Advanced Diploma in Financial Planning. This qualification helps financial planners acquire expert planning capabilities, which supports the delivery of sophisticated and comprehensive wealth management services.

Level	Unit code and Name
Advanced Diploma	(AF1) Personal tax and trust planning (AF3) Pension planning (AF4) Investment planning (AF5) Financial planning process
Diploma	(J01) Personal tax (J02) Trusts (J04) Pension funding options (J05) Pension income options (J06) Investment principles, markets and environment
Certificate	(CF6) Mortgage advice (CF8) Award in Long Term Care Insurance (FP1) Financial planning certificate (Financial services and their regulation) (FP2) Financial planning certificate (Protection, savings and investment products) (FP3) Financial planning certificate (Identifying and satisfying client needs)

Completed Qualifications

- Advanced Diploma in Financial Planning
- Diploma in Financial Planning
- Financial Planning Certificate
- Certificate in Mortgage Advice
- Certificate in Life and Pensions
- Award in Long Term Care Insurance