PMN Financial Management
B4 Endeavour Place, 11 Coxbridge Business Park
Farnham, Surrey, GU10 5EH

Telephone: +44 (0)1252 735010
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Matthew Heggie

Adviser
Chartered Financial Planner FPFS

matt@pmnfinancial.co.uk

Matt began his career with PMN back in October 2007 having no previous experience in the financial sector. Initially starting in an adviser support role, Matt gained a great understanding of the inner workings of PMN, its clients and its underlying ethos, this all whilst working towards his financial planning qualifications.

Matt soon qualified as a financial planner in June 2009, and in 2017 attained Chartered Financial Planning Status simultaneously becoming a Fellow of the Personal Finance Society.

Matt now provides advice to over 100 clients within the firm across all areas of the financial planning sphere. He has become increasingly involved with the next generation of our existing clients, emphasising our commitment to long term generational planning as a family orientated office.

Matt lives in Uxbridge, West London with his wife and daughter Lois. With any spare time remaining, Matt continues to pursue his main hobbies, music and sport. Being an Arsenal fan, Matt is familiar with disappointment and as his football ability has begun to decline in recent years he has now turned to golf, which by his own admission 'needs some fine tuning'.

Career

2002-2004 Youth Trainee at Wycombe Wanderers F.C.
2004-2005 Customer Services Relations at Vauxhall Motors
2005-2007 Programmes Administrator at Brunel University
2007- Independent Financial Adviser at PMN Financial Management

Qualifications

Chartered Financial Planner – From June 2017
Fellow of the Personal Finance Society – From June 2017

Certificate in Financial Planning

CF1 (UK Financial Services, Regulations and Ethics)
CF2 (Investment Principles and Risk)
CF3 (Financial Protection)
CF4 (Retirement Planning)
CF5 (Integrated Financial Planning)
CF8 (Long Term Care)

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Diploma in Financial Planning

JO1 (Personal Tax)
JO2 (Trusts)
J12 (Securities Advice and Dealing)
RO1 (Financial Services, Regulations and Ethics)
RO2 (Investment Principles & Risk)
RO4 (Pension and Retirement Planning)
RO6 (Financial Planning Practice)
RO8 (Pensions Update)

Advanced Diploma in Financial Planning

AF1 (Personal Tax and Trust Planning)
AF3 (Pension Planning)
AF4 (Investment Planning)
AF5 (Financial Planning Process)