

# Pareto Financial Planning and Football Medicine & Performance Association

Working together for the benefit of members

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April 2020

# Who are we?

Pareto Financial Planning Limited is an award-winning firm of independent financial advisers (IFAs), with an established reputation for dealing in all areas of financial planning.

From our Manchester city centre offices, our experienced and highly-qualified financial advisers work alongside a professional team of support staff. Skilled in many administrative areas, we use the latest systems to deliver the highest standards of service to our clients.

Pareto has over £700 million under influence on behalf of thousands of diverse clients, from high net worth individuals to global PLCs. We successfully manage employee benefit solutions such as workplace pension schemes for over 500 companies and provide investment & savings advice to a wide range of private clients.

Our success comes from focusing on long-term relationships, ensuring we understand our clients' financial goals, and provide clear summaries and pro-active solutions that will be effective now and far into the future.





# What We Are Going To Do

Pareto Financial Planning have partnered up with the FMPA to provide guidance to FMPA's members on all matters financial, i.e. Pensions, Investments, Protection and Tax Planning.

Presently, the spread of COVID-19 is causing significant disruption across the country.

In these uncertain times, both the FMPA and Pareto are here to help you with financial challenges as they arise and provide guidance and support wherever possible.

Members must confirm their membership status at the point of contact.



# What We Can Assist With

At Pareto Financial Planning we offer advice on:

- Mortgages
- Protection
- Pensions
- Investments
- Tax Planning

If you would like a confidential, fee free, no obligation chat about any areas of your finances or would like to discuss what is happening with the markets and the effect on your savings, investments and pensions please feel free to contact Jamie Hogg or Dafydd Parry.



# Your Points of Contact



## **Dafydd Parry**

### **Independent Financial Adviser**

Dafydd has worked within the financial services industry for the past 10 years since graduating from Aberystwyth University with a degree in Business Economics. Dafydd has worked in various roles within the financial planning industry including paraplanning and advisory positions. His experience has given him a sound technical knowledge of financial planning. In 2016, Dafydd joined Pareto in a paraplanning capacity before being promoted in 2018 to the role of independent financial adviser. Dafydd now advises clients within the servicing department, applying his breadth of knowledge and technical experience to support Pareto clients with their ongoing financial needs.



# Your Points of Contact



## **James Hogg**

### **Independent Financial Adviser**

James has worked within the financial advice industry since graduating from Newcastle University with a BSc Honours degree in Economics. He has worked in various roles within the industry, building up a strong technical knowledge of financial planning to compliment his keen interest in the economy. James currently works within the servicing department at Pareto, working closely with his clients to ensure all their ongoing needs are identified and met.



# Any Questions?

In the current climate, we envisage that you will all have similar questions regarding COVID-19, how it has impacted you and whether any support is available.

In the first instance, can you please send any questions you may have to Eamonn Salmon who will collate all questions received.

We will then create a 'Frequently Asked Question' document which will be issued to all members and will be available on the FMPPA website.

