Croft&Oakes
CHARTERED FINANCIAL PLANNERS

With you every step of the way to a bright financial future.

CHRIS OAKES, FPFS

FPFS CERT CII (MP & ER)
CHARTERED FINANCIAL PLANNER

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QUALIFICATIONS

Personal Finance Society (PFS)
Fellow - FPFS

The Chartered Insurance Institute (CII)
Chartered Financial Planner

Certificate in Mortgage Advice
Cert CII(MP)

Advanced Diploma in Financial Planning
AF1 - Personal Tax and Trust Planning (CII)
AF3 - Pension Planning (CII)
AF4 - Investment Planning (CII)
AF5 - Financial Planning Process (CII)

Diploma in Regulated Financial Planning
J01 - Personal Tax (CII)
J02 - Trusts (CII)
J05 - Pension Income Options (CII)
J06 - Investment Principles, Markets and Environment (CII)
R01 - Financial Services, Regulation and Ethics (CII)
R04 - Pensions and Retirement Planning (CII)
RO5 - Financial Protection

Certificate in Financial Planning
CF6 - Certificate in Mortgage Advice (CII)

CeRER - Certificate in Equity Release
ER1 - Equity Release (CII)

Certificate in Long-Term Care Insurance (CeLTCI)
CF8 - Long-term care insurance

OVERVIEW

As a Chartered and Independent Financial Adviser (IFA) I am able to provide unrestricted, whole-of-market financial advice. My Chartered Financial Planner status also proves that I am qualified to the highest level in the industry, with this particular standing being widely regarded as the 'gold standard' for financial advisers.

EXPERTISE

Although I am able to advise on a wide range of financial related issues and products, my areas of expertise include Investment Planning, Corporate Financial Planning and Pensions Advice. This also includes giving occupational pensions advice, such as final salary schemes.

Furthermore, as a Fellow of the Chartered Insurance Institute (CII) I also create and mark examinations for those wishing to achieve financial qualifications through CII. I have spent my career in Financial Services and pride myself in recognising that everyone's personal situation is unique. When we established Croft & Oakes we shared a vision to helps clients make the best financial plans by demystifying the complex, drawing on the expertise of highly qualified and experienced independent advisers with a professional yet friendly approach.

HOBBIES AND INTERESTS

I try to stay quite active and particularly enjoy cycling. I am also a keen follower of football and cricket, although I don't find the time to play either anymore.

I am also an animal lover and volunteer with a local animal charity.

CAREER HISTORY

Chartered and Independent Financial Adviser
(2016 - present) Croft & Oakes

Chartered and Independent Financial Adviser
(2014 - 2016) True Potential

Senior Wealth Planning Manager
(2007 - 2014) Lloyds TSB

- Spent time in Lloyds Private Banking
- Corporate Financial Planning Specialist advising businesses with turnovers ranging between £2-10million.
- Advised on corporate investments, pensions planning and succession planning

Financial Planning Manager
(1999 - 2007) Lloyds TSB

- Having joined Lloyds TSB as a Financial Adviser I worked my way up to Financial Planning Manager
- Managed a team of advisers alongside advising a select set of clients myself