



Croft & Oakes
CHARTERED FINANCIAL PLANNERS

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



IAN HOLMES

CERT CII - CEMAP
BUSINESS MANAGER

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QUALIFICATIONS

HND in Business and Finance

Certificate in Mortgage Advice and Practice
(CeMAP)

JOI – Personal Tax (CII)

Financial Planning Certificate
(FPC 1, 2 & 3)

OVERVIEW

As Business Manager at Croft and Oakes it is my mission to ensure every part of the business runs effectively and efficiently so that as a team we can provide our clients, both new and existing, with the highest standards of service and exceed expectations.

EXPERTISE

I have worked in Financial Services for over 25 years in many roles, Adviser, Training & Development and Management. My previous experience has given me a perfect grounding for my current role at Croft & Oakes Financial Planners. From completing review documentation and research for existing clients to ensuring all data and analysis material is available for our new clients, my experience and knowledge of Financial Services is invaluable.

HOBBIES AND INTERESTS

I was born in Shropshire and have always lived in the area. Outside of work I am married and have three children so needless to say spare time is minimal, but I gain great enjoyment and relaxation as a volunteer for the National Trust, I take a keen interest in most sports and (try) to keep fit.

CAREER HISTORY

Business Manager
(2017 - present) Croft & Oakes

Financial Adviser
(2010 – 2017) Halifax

- Provision of financial advice to the mass affluent market

Financial Planning & Development Manager
(2007 – 2010) West Bromwich Building Society

- Coached and developed teams to ensure production and quality targets were achieved.
- Assisted recruitment and Assessment Centres

Financial Planning Manager / Field Induction Coach
(1997 – 2007) LloydsTSB

- Responsible for training and mentoring new financial advisers

Financial Adviser
(1993 – 1997) Britannic Assurance