

Ian Larthe de Langladure DipPFS

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Profile

Ian is a Diploma qualified financial planner who's desire is to use his knowledge and experience to enable clients to take advantage of the opportunities they come across. He creates financial plans as an effective way of bringing clients business and personal goals together to help clients try and obtain what they really want out of life.

He has a strong background in protection and in-depth knowledge of the property market. He uses this knowledge and his experience within the investment market to help clients protect what they have built up and feel that they are financially well-organised for the future.

Qualifications & Affiliations

Ian believes in taking professional qualifications and continues to undertake professional development. He is currently working towards his Advanced Diploma with the Chartered Institute of Insurance.

- **STEP Certificate for Financial Services (obtained 2012) (Trusts and Estate Planning) with Society of Trust & Estate Practitioners**
- **Chartered Insurance Institute –Diploma in Financial Planning (obtained 2011)**
- **Chartered Insurance Institute – Financial Planning Certificate (obtained 1996)**
- **Member of the** Chartered Institute of Securities & Investment (CISI), formerly the Institute of Financial Planning (IFP) since 2008.
- Other previous qualifications include Certificate in Mortgage Advice and Practice (2001) , Lifetime Mortgage Activities (2006), Long Term Care (2006)

Work history

The Aspire Partnership LLP

Jan 2010 – Present

Founding Partner and Financial Planner

The Aspire Partnership was created to offer a financial planning service which helps people make the most of the opportunities that they come across. Aspire's philosophy is to provide clarity, transparency and a client focused approach therefore client's should feel they are dealing with a firm that truly has their interests at heart and can help them to meet their own personal goals and aspirations.

Aspire deal predominantly with the financial needs of individuals, small business owners and those who look after other peoples' money (Trustees, Attorneys & Deputies). Aspire offers tailored services to meet the needs of these different client groups.

Ian's skills include: excellent client empathy; strong communicator; technical analysis & research.

Responsibilities:

- Financial Planner – responsible for providing suitable financial advice to retail clients
- Senior Partner – responsible for corporate governance of a firm directly regulated by the FCA, in particular insurance mediation and the firm's own finances.

Interests: All sports particularly rugby, golf and skiing. General fitness and world travel.

Client testimonials are available on request

**Bluefin Financial Advice – Bristol
Financial Planner (& Integration Manager Oct 07 - Oct 08)**

October 2007 – January 2010

Crest were acquired by the Thinc Group Ltd now t/a Bluefin in October 2007. Whilst successfully integrating the Crest group of companies into Bluefin.

Responsibilities:

- Managing the integration of Crest Asset Management and Crest Financial Group Ltd advisers and support staff into the Bluefin business; along with the continuation of their development plans
- Ensuring client expectations are met within framework of Bluefin Financial Advice
- Creation of bespoke service-based client solutions providing trusted financial planning and quality advice

Selected Achievements:

- Instrumental in many improvements in clients lives; both personally and professionally
- Recognised as a consistent high performer within the Bluefin National sales team
- Worked with Bluefin senior management to build defined client proposition

**Crest Financial Group Ltd (Director)
& Crest Asset Management (Partner & financial adviser) – Bristol 2004 – 2007**

With the Retail Distribution Review (RDR) firmly in mind, Ian was instrumental in reorganising, restructuring and remodelling the business processes at Crest in readiness for a more service led proposition. Ian engaged with an external consultancy firms for 360 degree feedback throughout the delivery process and fully integrated the FSA's new Treating Customers Fairly policy.

Responsibilities:

- Shareholder in Crest Financial Group Ltd and therefore responsible for a profitable and compliant Independent Financial Advisory and Planning directly regulated business.
- Managed multi-disciplinary company that included diverse blend of IFA and tied adviser teams
- Share of Crest Asset Management partnership; directly responsible to AXA for firms activities

Selected Achievements:

Crest Financial Group Ltd (CFG) – Directly Authorised Financial Planning Business

- Organised due diligence papers in preparation of sale of business to Thinc Group Ltd – FSA measures achieved and audit and compliance requirements met
- Increased adviser competence by actively encouraging professional development

Crest Asset Management (CAM) – AXA Appointed Representative

- Consistently a top five fee earning firm within the AXA Adviser Network (AAN)
- Represented Crest at regular AXA Key Development meetings

LdeL Mortgage Services Ltd

2001 - 2004

Having spent the previous ten years within a corporate structure, Ian was keen to experience life as a small independent business owner. LdeL was set up to provide independent property related advice across the market.

Responsibilities:

- Establishing the business within the Mortgage Code of Conduct
- Within three years building sufficient turnover and value to merge with Crest Financial Group in 2004

Royal Sun Alliance Property Services (RSAPS)

1991-2001

Ian started at RSAPS as a sales consultant and was a consistent top ten national performer. This led to promotion to an Area Sales Manager looking after a team of 10 financial advisors. This team was again within the top ten of national sales. Ian was then promoted to Regional Sales director looking after 30 offices within the South. .