HAMNETT
WEALTH MANAGEMENT

Personal Finance Society Associate Firm

Financial Planners Chartered

Pension TRANSFER Gold Standard

Graham Walton

Dip PFS, Cert CII, Independent Financial Adviser

I graduated with a degree in Accounting and Finance in 1994 and, other than two years with a bank, I have been a Financial Adviser ever since. I have been with Hamnett Wealth Management since 2002 and I specialise in advising clients on green and ethical investments, pensions and tax planning.

As an Independent Financial Adviser, I believe that positive long term returns from capital which is deployed for profits can be used to tackle challenges faced by our world today without compromising our returns. This is achieved by investing in companies that have the intention to make a positive environmental and social impact with their products and services.

The fund managers I use hopefully identify these companies who deliver profits and measurable benefits for the environment and society. They deliver capital to where change is most needed. This is about using the power of capital to bring better health and education to millions, help restore the planets ecological balance and to build inclusive societies.

Evidence suggests that companies who observe high standards towards the environmental social and governance will outperform those that don’t, delivering long term sustainable returns. This eventually leading to a broader definition of wealth to include prosperity for economies society and our planet.

Qualifications:

Degree
BA Hons Accounting and Finance

Advanced Diploma in Financial Planning
The Diploma in Financial Planning is an advanced technical qualification which demonstrates an understanding across a broad range of key advisory areas:

J01 - Tax and Investments
J04 - Pension Funding Options.
J05 - Pension Income Options.

Diploma in Financial Planning

These are core qualifications providing a grounding in insurance essentials, mortgage advice, equity release and life and pensions administration respectively:

CF2 - Investment and Risk
CF6 - Certificate In Mortgage Advice and Practice
CF7 - Certificate in Financial Planning and Lifetime Mortgage Activities
FP1 - Financial Planning Certificates 1 (CII)
FP2 - Financial Planning Certificate 2 (CII)
FP3 - Financial Planning Certificate 3 (CII)
HR1 - Home Reversion Plans

Tel: 0114 235 3500

graham@hamnettwealth.com