

# PROFILE

## Gregor DK Edmond

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### SUMMARY

Dedicated Financial Services Director for EFSL with substantial experience in assisting in the coordinating of Investment Committees for IFA companies, constructing risk-adjusted model portfolios and making proposals for asset allocation / investment compositions etc., with rationale provided. Proven track record with considerable expertise in utilising Financial Express Analytics and Investment Platforms.

Partner in Edmond Consultancy LLP. Expertise in creating Investment Reviews (including Asset Allocation, Risk Assessment and Fund Selection). Regularly write Research to support Investment Committee meetings and deal with day-to-day enquiries. Currently studying with a view to holding DipPFS and IMC and very often attend webinars, virtual calls with many fund managers and support staff. Member of Personal Finance Society.

### KEY SKILLS AND ACHIEVEMENTS

#### **Director, Edmond Financial Services Limited (EFSL)**

*March 2014 -*

Established EFSL, working with my father Kenneth to build our business. Testimonials available on request, also please see [www.edmondfls.co.uk](http://www.edmondfls.co.uk). Registered with ICO Data Protection Register.

#### **Partner, Edmond Consultancy**

*March 2014 -*

Established and developed Edmond Consultancy. I am largely responsible for this side of our business, generating Investment Reviews (at individual and group scheme level) mainly for our primary client (approximately 500 reviews + group schemes per annum), with reviews also produced for several IFA clients under Edmond Consultancy LLP. Examples available on request.

#### **York University**

Attended York University before returning home to help my father build EFSL and EC LLP.

#### **Loretto School / George Watson's College**

Attended George Watson's Junior School then moved to Loretto in Musselburgh for Senior School (lived in close proximity).

### INTERESTS

Current affairs, politics, investment strategies, financial products. Season ticket holder, Heart of Midlothian football club. Enjoy reading, films, usual stuff.