

PROFILE

Kenneth Edmond DipPFS, IMC

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SUMMARY

Dedicated Financial Services Director with substantial experience in coordinating Investment Committees for IFA companies, constructing risk-adjusted model portfolios and making proposals for asset allocation / investment compositions etc., with research provided. Proven track record, currently chairing 12 Investment Committees with influence on assets over £2bn. Expertise in writing Investment Reviews (including Asset Allocation, Risk Assessment and Fund Selection). Hold DipPFS, IMC and CF8 Long-term Care. Member of Personal Finance Society.

KEY SKILLS AND ACHIEVEMENTS

Director, Edmond Financial Services Limited (EFSL)

March 2014 -

Established EFSL, working with my son to build our business, assisted by my wife and our locum. Testimonials available on request, also please see www.edmondsl.co.uk. Registered with ICO Data Protection Register.

Partner, Edmond Consultancy (EC LLP)

January 2004 –

Established and developed Edmond Consultancy for the purposes of producing Investment Reviews for IFA clients for use with their client base. For many years worked exclusively on a full-time basis for a successful IFA company as a consultant, largely in the capacity of in-house Investment Strategist. In the course of this work I designed and developed a comprehensive Investment Review product, which proved instrumental in helping to significantly escalate IFA's FUM. This is a growing area, and more IFA clients are using this product, with examples available on request.

Head of Indices and Information Services, Quantitative Techniques, HSBC Bank plc

June 1987 – 2003

Senior Executive for 16 years with HSBC Investment Bank working in its highly-respected Quantitative Techniques Division, I managed a team of analysts and built-up a substantial client base of institutional houses, designing and providing index and information services. Created and maintained a stable of international indices, used extensively by the Financial Community.

INTERESTS

Enjoy studying topical market, economic and political developments (write monthly Outlook available on subscription). For recreation, golf, gym, running, piano, guitar, online Scrabble and reading. Season ticket for the RSNO and Heart of Midlothian. Completed eleven marathons. Member of RSPB, Caledonian Club, two Golf Clubs. Granted a patent for a musical invention. Married with three children.