



Ever wondered what goes on behind the scenes at BMFS? Well, during 2022 we'd like to introduce you to some of the key staff and teams that work hard behind the scenes to ensure that we provide a high-quality financial planning service to all of our clients.

We are starting off with our Paraplanning team, which comprises of Senior Paraplanner Paul Back, and Paraplanners Lisa Critchley, Debbie Brereton and Grace Burgin.

Paul

Having worked in the industry for 29 years, 21 of which as a Paraplanner, Paul joined BMFS a year ago, and is well placed with his wealth of knowledge and experience to head up the team. Paul provides technical support and analysis to the Financial Planners on a variety of matters including inheritance tax, pension and investment planning. For example, if you've asked your Financial Planner to assess whether it's beneficial to transfer an old pension plan to a new contract, it's highly likely Paul has completed the analysis on this for you.



Lisa

With a track record of working in the financial services industry for over 30 years, Lisa joined BMFS in 2017 and is a subject matter expert in cash flow modelling. Many of you will have met Lisa if you've had a cash flow forecast presentation with us. Cash flow modelling is an integral part of the financial planning process at BMFS, which really does help clients turn their dreams into reality!

Debbie

Debbie has worked at BMFS for almost 19 years and having wanted to get her teeth stuck into the more technical side of the things, stepped up to the role of Paraplanner in 2018. Debbie works with the Financial Planners providing critical analysis of clients' portfolios and plans, from fund analysis to report writing, Debbie's role is an invaluable part of our ongoing advice service.



Grace

Having achieved a First degree in Economics and Politics, Grace joined BMFS in July 2021, as a trainee Financial Planner. As part of her career development, Grace is currently working as a Paraplanner to learn the technical side of the role and has already joined Lisa as an expert in cashflow modelling as well as providing investment and pension analysis to all of the Financial Planners.

Our Paraplanning Team is just one of the key elements helping to provide our high-quality financial planning service to all of our clients. Over the rest of the year look out for further updates, as we will be introducing more of the wider team working on your behalf.