

Biographical Notes

Garry Hale DipPFS

Director

Garry has been working in Financial Services since 1990 having spent many years working for Scottish Amicable and Prudential on their Intermediary sales and Marketing division. Garry established his practice HK Wealth Managers Ltd in 2001 as a fee based financial planning practise offering clients a comprehensive financial planning and annual review service.

Garry is passionate about raising standards and professionalism within the independent financial advice sector. He believes that will in turn improve the perception and reputation of the sector to the ultimate benefit of consumers and the profession and encourage more consumers to seek advice from professional advisers.

Garry is currently qualified to The Personal Finance Society Diploma level and is representative of the majority of PFS advisers who are not Chartered Financial Planners. Current Studies include further DIP and Advanced level qualifications to progress to Chartered status. Garry wishes to support those members who are not Chartered to pursue an appropriate further qualifications programme.

Garry has been actively involved in the PFS since its formation in 2005. He was previously Chairman of Central Scotland regional committee, in 2006 he become Area Liaison Officer for Scotland and was elected to the Board of Directors in November 2009. Garry wishes to utilise his PFS and regional committee knowledge to improve PFS membership benefits for all members.

Garry is 36 years old and is married to Chelanne and they have two great boys Josh age 8 and Ben age 5. Garry enjoys a work life balance spending family time with his wife and sons enjoying doing activities together at weekends particularly swimming. Garry also likes the outdoors and enjoys active sports including Ski-ing, canoeing and sailing.

November 2009