

Biographical Notes

Paul Lothian BA (Hons), ACII, APFS, CFP^{cm} **Chartered Financial Planner**

PFS Past President

Paul (41) has worked within the UK insurance and financial services industry since the age of 17. Initially employed in the Commercial Insurance sector, in 1990 Paul switched disciplines to train as an IFA. Paul has also formerly lectured in the Accountancy and Finance faculty of Dundee Business School (within the University of Abertay Dundee).

Paul is qualified by examination as an Associate of the Personal Finance Society (APFS) and Associate of the Chartered Insurance Institute (ACII). He has also attained a Bachelors degree with first class honours in Financial Services. Paul was among the first to attain Chartered Financial Planner Status in November 2005.

Also in 2005, Paul was involved in setting up Verus Financial Planning Ltd – a joint venture with a long-established firm of chartered accountants, MMG. The firm deals predominantly with business owners and professionals.

Paul's core business areas include investment portfolio planning, retirement and estate planning.

Paul was elected to the PFS Board in November 2006 and as President in November 2008.

He lives in Dundee's West End with his wife, Victoria, and their four young children. His interests include field hockey, music, cycling and hill-walking.

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