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PFS Board
Biographical Notes

Andy Briscoe
Interim Chair

Andy has extensive experience of managing large organisations, start-ups and turnarounds in a variety of industries and in both the private and public sectors. He is the former Chair of Indesser, a joint venture between the Cabinet Office and Equifax, the Money Advice Service, The Policy Shop and IT Freedom.

His non-executive and chair positions follow an extensive career as a CEO in the financial services sector, including with Life Trust Holdings and Compucard, and as a strategic advisor to private equity groups, including the Carlyle Group. He was previously Managing Director for AA Insurance Services, the UK's largest general insurance intermediary, and Managing Director of Goldfish Credit Card.

Anthony Ward
President

Anthony has held a variety of roles across his 17 years in the industry and is passionate about Financial Planning and its benefits to individuals and society.

Currently, he is a member of the Senior Leadership Team at Barclays Wealth and as the Wealth Planning Head of Distribution he is also responsible for the strategic direction and growth of the business.

As a Fellow of the Personal Finance Society and a Chartered Financial Planner, prior to joining Barclays Anthony had a successful career as an IFA gaining experience at major Accountancy firms and Private Banks. He has been actively involved with both PFS and CII committees and worked as both an examiner and trainer. Anthony joined the PFS Board in September 2021 and took the opportunity to Chair the Board for the first time in January 2023.

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Carla Brown

Director

Carla is Managing Director of Oakmere Wealth Management Ltd and Director of CL Wills and Estate Planning.

Carla is a Chartered Financial Planner and Fellow of the PFS. She graduated from Loughborough University with an MSc in Wealth Management in 2018, is accredited as a later life adviser with the Society of Later Life Advisers (SOLLA), and holds a Certificate in Relational Financial Planning. In 2019, Carla won the inaugural SJP 'Chartered Financial Planner of the Year' award and in 2021 went on to win the prestigious PFS 'Chartered Financial Planner of the Year 2021/22'. She has been nominated for multiple other awards.

Prior to starting her own business in 2011, Carla spent 15 years working with HSBC and Bradford & Bingley as an Independent Financial Adviser, and Cheshire Building Society as a Financial Consultant. She has also gained governance experience as a Trustee and Director of DMPL Ltd, a resident's association for a private housing development, and as a school governor.

Daniel Williams

Director

Daniel has been an Independent Financial Adviser with Morgan Williams & Co since 2016, and also sits on the firm's investment committee.

Daniel is a specialist in Cyber Crime avoidance, leading his firm's work in the space and educating other Financial Advisers and Financial Services Professionals, in part as a member of the PFS ScamSmart initiative. He is an Education Outreach Ambassador for the Yorkshire Region and an

Education Champion for the PFS 'My Personal Finance Skills' initiative, running workshops in

schools across the UK. In 2022, Daniel was named the PFS 'Financial Education Champion of the Year' and has been identified as a CityWire Top 35 Next Generation Planner on three occasions.

Prior to becoming an IFA, Daniel was Managing Director of creative design agency, Tailor and Baker, and an international headhunter, with RMI Consultants Ltd.

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Catherine Seddon
Director

Catharine's wealth of leadership experience extends across television, law, health, and pensions. She spent 20 years in television, first as a producer/director for the BBC and then running her own independent production company. Her films were broadcast on strands such as *Inside Story, Cutting Edge, To the Ends of the Earth and Everyman*.

Catharine currently sits on the board of the Legal Services Board, Gambling Commission, Human Fertilisation and Embryology Authority and Children and Family Courts Advisory and Support Service. She also holds a range of tribunal and quasi-judicial appointments, and sits as a presiding magistrate in central London.

Elizabeth Bastin
Director

Elizabeth is currently the EU Regional Head for Financial Crime Compliance for a major Tech company. She was previously a Vice President for a major global Bank, she has a solid background in financial regulation, compliance, and legal risk, spanning over 10 years. She has advised various major financial institutions on compliance and legal risk matters, including high profile investigations commissioned by the FCA and other global Regulators. She specialises in providing strategic advice on regulatory matters and how to strengthen risk controls to ensure the business can thrive in a compliant manner.

Elizabeth is also a financial inclusion and social mobility advocate; she is the co-founder of a social enterprise, which provides financial education and employability support to individuals from underserved backgrounds. Her commitment to creating and instilling change for the underserved has led to her achieving Fellow status from the Royal Society of Arts.

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Christine Elliott

Director

Christine has a rich depth of experience gathered over a career spanning financial services, leisure, journalism, culture, communications, education, property, healthcare, policing, and technology.

Christine currently holds non-executive roles with the ExCo Group, Positive Planet UK Advisory Board, Sonas Group, Independent Office for Police Conduct, The Health and Care Professions Council, and Editors' Code of Practice Committee. Formerly, she was Chief Executive of The Institute for Turnaround and Transformation for a decade, and Director of Bletchley Park. She has a wealth of board experience, having held dozens of other executive and non-exec and chair positions. Her track record includes transformation, change, innovation, complex problem-solving, regulation, systems-thinking and collaboration.

Edward Grant

Director

Edward is Director, Technical Connection at St. James's Place, and a Finance in Society Research Institute advisory board member, a body formed in 2022 to develop high quality research to support policymakers and the industry to improve access to financial services and tackle financial exclusion.

A passionate advocate of the financial planning profession, Edward is a Chartered Financial Planner, Chartered Wealth Manager, Fellow of the PFS with a Masters focused on supporting clients with vulnerable circumstances. He is a past president of the Personal Finance Society, serving six years on the PFS Board, past vice president of the Chartered Insurance Institute and Insurance Institute of London, Chair of the TISA Tax Committee, CII Pension Trustee and Liveryman of the Worshipful Company of Insurers. During his extensive career, Edward has sought to support, mentor and lead the development of initiatives to build consumer confidence and trust in the value of financial advice.

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Neil Buckley

Director

Neil is an experienced non-executive director and chair with an in-depth knowledge and understanding of professional and economic regulation in the consumer and public interest. He has worked in a diverse range of professions, including journalism, law, and health and is currently Chair of the Regulatory Board of the Institute and Faculty of Actuaries (a Royal Charter body), which holds actuaries to high professional standards of competency and conduct. He is also holds non-executive director positions with the General Pharmaceutical Council and Valuation Tribunal Service.

Neil was previously Chief Executive of the Legal Services Board. He was called to the Bar in 1987 and spent more than a decade as a solicitor before holding senior roles with Ofcom, including as Director of Investigations, and its regulatory predecessor, Oftel.

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Neil Watts

Director

Neil is a Council Member of the Alpa Plus Group, on the Board of Saffron Housing Trust, on the Board of Crocus contractors Ltd, and a Member of the St Edmundsbury and Ipswich Diocesan Multi Academy Trust.

Previously, he was a secondary school headteacher in Suffolk for 21 years and also worked in advertising regulation at the ASA, press regulation at IPSO and as an Advisory Board member of CIFAS.

Neil was a founder member of the Board of Ofqual and a lay member of the Architects Registration Board.

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Sarah Howe

Director

Sarah has an extensive executive career with 13 years on the Board of regulated financial Services firms , most recently as CEO of a regional Building Society. An experienced INED, Committee Chair and Board advisor Sarah has held a number of non-executive positions including Chair of a Consumer Panel for one of the largest financial networks in the UK; council member for the Building Society Association and is currently a Board Trustee for a local Hospice where she also chairs the Hospice Transformation Committee.

A background in Marketing, Customer Experience and operations has enabled Sarah to work across multiple sectors in commercial roles including banking, health insurance, personal lines insurance, wealth and financial advice through to retail home shopping and third sector. Sarah’s experience spans global blue-chip organisations through to small businesses servicing both B2B and B2C customers.

Sarah considers Governance to be a particular area of strength gained from 13 years working in the regulated financial service sector and is an accomplished business strategist with focus on driving change and innovation through deep understanding of the customer, the key stakeholders and the organisational culture, values, purpose, and vision.