

HARVEY WICKHAM - CURRICULUM VITAE

PERSONAL DETAILS

Name: Harvey Wickham **Date of Birth:** 21 June 1972
Address: 59 Crondall Lane **Age:** 49
 Farnham
 Surrey
 GU9 7DG **Status:** Married
Phone: 0783 4604458 (Mobile) **Nationality:** British
e-mail: harvey@meliorwealth.com

EDUCATION

2011 CII Diploma in Financial Planning
1999 IMC (Investment Management Certificate)
1995 ATT (Association of Tax Technicians)
1990-1993 Chemistry B.Sc. (Hons) 2ii
 Nottingham University

WORK EXPERIENCE

March.12-Date **Melior Wealth**, 59 Crondall Lane, Farnham, Surrey,
GU9 7DG

I run my own authorised financial advisory practice, advising private clients on investments, savings, tax planning, pension planning, inheritance tax planning and protection.

July.07-Mar.12 **Merrill Lynch Wealth Management**, Merrill Lynch
Financial Centre, 2 King Edward Street, London, EC1A 1HQ

I worked as a **Financial Adviser** in the private client department. I advised HNW individuals on tax efficient investing, financial planning, retirement planning and estate planning. As part of this role I brought HNW clients into the bank. The sales process involved researching prospects, contacting them by phone, developing a trusting relationship, opening accounts, and servicing the accounts on an ongoing basis.

October.05-July.07 Mercer Human Resource Consulting, 1 Tower Place West, TowerPlace, London, EC3R 5BU

I worked as a Financial Adviser largely assisting pension consultants to write reports on tax simplification and other pension issues. I also researched investments, prepared reports on pension, investment, and protection advisory matters. I helped with implementation projects for new software and new platforms.

Feb.02–Oct.05 Pier Financial, Felix House, 85 East St., Epsom, Surrey, KT17 1DT

I worked as a Paraplanner, assisting an IFA with the office-based duties that he required. This included writing reports, assimilating fact-find forms, compliance duties, and dealing with queries from insurance/investment companies and clients.

1995-Feb.02 Douglas Deakin Young Ltd, 22-25a Sackville Street, W1S 2DH

I worked as the manager of the tax department, which handled the tax returns of around 300 clients. I managed one junior assistant. I also assisted the investment managers in advising clients which investments had performed well, and which badly, and the reasons for out-performance or under-performance.

1993-1995 National Westminster Bank, Farnham Branch

I worked in the personal tax department, dealing with compliance issues on a junior allocation of clients. I generally dealt with individuals and trusts, but mainly individuals.

INTERESTS

I am familiar with the major office software programs and know Microsoft Office well. I can touch type at around 30 words a minute. I have used several major databases in my career. I have also used quotation platforms.

I love sport and play watch all sports whenever I can. I also like walking and camping in the summer. I am a keen runner, and try to run as many races as possible. My biggest race so far has been the New York Marathon. I don't win these races, but I enjoy them!

I have a full clean driving license.