

## Brian Sweeney – Financial Adviser

Name: Brian Sweeney  
Role: Financial Adviser  
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### Overview

Brian is based in Glasgow and has worked in Financial Services as a Financial Adviser for over 20 years. He offers financial planning advice on most aspects of pensions and investments.

### Brian has

- Experience in all core advice areas including Personal & Group Protection, Pensions, Investments, and Mortgages.
- Achieved the London Institute of Banking and Finance Diploma in Financial Advice (DipFA) and Certificate in Mortgage Advice and Practice (CeMAP).
- Worked across all client areas assisting both private clients and corporate clients working towards achieving their financial planning objectives.
- Taken a solid network of clients through the customer journey to provide high-quality advice. Clients range from Students right out of University or College, business owners, people starting on the property ladder, clients in the mid-stage of their working life, and people coming up to retirement wanting to maximise their standard of living.
- An experienced network of specially selected experts, who can support all your financial advice needs.

### Specific Skills

- Group / Business Protection
- Personal Protection
- Mortgages Buy to Let / Residential
- Near and post-retirement planning
- Inheritance taxation planning

### Personal

Away from work Brian's interests include sport and travel.

The Financial Conduct Authority does not regulate taxation planning and inheritance tax planning.

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