

CWM CHARTERED WEALTH MANAGEMENT	PRESS RELEASE
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Partner promotions at Chartered Wealth Management Ltd



Paula Eardley, FPFS, FCSI



Tony Robinson, FPFS, FCSI

Leading independent financial advice firm, Chartered Wealth Management, have promoted two advisors to the role of Partner.

Paula Eardley and Tony Robinson are both Chartered Financial Planners and Chartered Wealth Managers and have achieved the highest accolade of Fellowship status in both disciplines.

David Spencer, Director, said *“Paula and Tony have set the standard high in terms of independent advisor qualifications and high-quality advice, each having over 25 years’ experience in the industry. We are committed to building on the enviable reputation we have in delivering bespoke advice and welcome them both onto the leadership team as we drive the business forward over the coming years”*

Paula, who joined the firm in 2012, is known for her excellent technical knowledge alongside a compassionate and dedicated approach. By focusing on the broader family, she enhances both her client’s and their wider family’s circumstances. Paula specialises in pre/post business sale planning, post-divorce, lottery wins and inter-generational tax and investment planning.

Tony joined the firm in 2014 and is passionate about client service. His experience allows him to develop and implement bespoke plans to assist clients in the preservation and growth of their assets. With a strong focus on entrepreneurs and family business owners, he enjoys working closely with the next generation to ensure that the family legacy is maintained. Tony has a valued network of external professionals whom he can call upon to provide a full holistic approach.