



Heron House
Financial Management Ltd



Chris Jordan - Senior Financial Planner

(Chartered and Certified Financial Planner cm & IMC)

Chris has been providing independent advice to individuals and companies for over 20 years.

He is a life planner, holistic financial planner and wealth manager, specialising in investment management, advanced retirement planning strategies and corporate financial planning issues such as exit strategies for successful business owners and senior executives.

Chris's expertise in all these areas has been recognised with a string of national awards including the Financial Times' Financial Planner of the Year in 2008; the Financial Times Money Management Personal Pension Planner of the Year; Directors' Pension Planner of the Year and Ethical Investment Planner of the Year. He is an Institute of Financial Planning (IFP) Team Challenge winner and past Chair of the IFP in South Wales.

As one of the most highly qualified Financial Planners in the UK, Chris has regularly been asked to be a contributor on the BBC News Channel and to BBC Radio programmes.