

## **Dean McFarlane APFS BA (Hons)**

Chartered Financial Planner

### **Contact**

Email: [dean@deanmcfarlane.com](mailto:dean@deanmcfarlane.com)

Phone: 07484164297

### **Profile**

Chartered Financial Planner based in Stirling, Scotland. I specialise in helping professionals and families build long-term financial freedom through evidence-based investing and lifestyle financial planning.

### **Professional Experience**

Carbon Financial Partners — Chartered Financial Planner  
2020 – Present

- I spent time in each of the back-office teams while completing my Diploma in Regulated Financial Planning.
- I worked with 8 senior financial planners in a support capacity for 2 years before starting to work with my own clients.
- I have extensive experience in a client-facing role, onboarding new clients through our advice journey, conducting annual reviews and presenting cashflow modelling live.

### **Education**

Robert Gordon University, Aberdeen  
BA (Hons) Accounting & Finance — 2016 to 2020

- 3<sup>rd</sup> year of my degree involved a 14-month industrial placement working with National Oilwell Varco in their finance team. I worked under the UK Statutory Accounting Manager.

### **Qualifications**

- Chartered Financial Planner (APFS)
- Diploma in Regulated Financial Planning (DipPFS)
- Certificate in Discretionary Investment Management

### **Interests**

Optimising my health and fitness, personal development, sport and raising a young family. Background in powerlifting from university and have taken up running in the past year to improve cardiovascular fitness.