

Dean McFarlane APFS BA (Hons)

Chartered Financial Planner

Contact

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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

- 3rd 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.