



Alan Leslie APFS
Chartered Financial Planner

Director, Head of Private Clients

Qualifications

- **Chartered Financial Planner**
- **Fellow** of the Life Insurance Association
- **Associate** of the Securities & Investment Institute
- **Associate** of the Society of Financial Advisers
- **Associate** of the Personal Finance Society
- **Member** of the Chartered Insurance Institute, holding the Advanced Financial Planning Certificate

Years Experience in the Financial Services Industry

23 Years

Alan spent 10 years at a successful firm of Independent Financial Advisers in Marylebone, advising a wide range of Private and Corporate Clients.

Following this, in 1996, he co-founded Templar Financial Planning Limited with Martin Green Ravden (MGR), a long-established firm of Chartered Accountants and Business Advisers.

The MGR Principals recognised the need for very high level independent financial advice for their own clients and also the wish to extend these skills to clients from other professional firms, principally Lawyers and Accountants.

Clients of the Firm comprise “traditional” entrepreneur businesses and Private Clients, including clients from the worlds of sports, media and entertainment.

Alan’s portfolio comprises UK resident/domicile clients and UK resident/non-UK domicile (US and non-US domicile) clients.

As the Firm has expanded, now with a strong team of highly-qualified Advisers and support staff, as Templar’s founder, Alan spends most of his time dealing directly with complex financial planning for High Net Worth and Ultra High Net Worth Private Clients together with a small number of successful businesses.

Alan’s advice encompasses all aspects of Wealth Management, Asset Allocation, Retirement Planning, Estate Planning, Succession Planning and Philanthropy, taking the role of Trusted Adviser on all aspects of clients financial affairs.

Alan continues to drive Templar forward, forming selected strategic alliances with professional firms who require the highest-quality financial advice for their own clients.

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