



**Heron House**  
Financial Management Ltd



## **Saran Allott-Davey** - Senior Financial Planner

(Chartered and Certified Financial Planner™ & IMC)

Former Chair of the South Wales Branch of the Institute of Financial Planning (IFP), Saran has been involved in providing financial planning services to companies and individuals for over 20 years. She is one of the most highly qualified Financial Planners in the UK.

Saran enjoys working with a wide range of individuals, from those starting out in their careers or professions, to those who have sold businesses or retired from employment and are looking for investment advice. She has a personal interest in ethical investment and specialises in investment and inheritance tax planning.

Regularly broadcasting on financial issues for the BBC, Saran also writes for the financial press and is frequently invited to speak at conferences throughout the UK.

Her experience as a Financial Planner and businesswoman has been recognised with three outstanding National awards: Winner of the Woman IFA of the Year, Winner of the Financial Adviser Investment IFA of the Year, and Runner Up of the Woman IFA of the Year.