

The real test of professionalism for wealth managers,
financial planners, paraplanners and investment specialists

The Chartered Institute for Securities & Investment (CISI) congratulates all those named below on their successful completion of the CISI Chartered Wealth Manager Qualification, CISI Diploma, Diploma in Financial Planning, the Certificate in Private Client Investment Advice and Management (PCIAM) and the ICAEW/CISI Diploma in Corporate Finance exams in the summer 2016 session.

As the professional body for the wealth management, financial planning, securities and investment industry, the CISI is the leading provider of financial services qualifications in the UK. These postgraduate professional level qualifications are internationally recognised and are designed by senior practitioners to meet the needs of the financial services industry.

Completion of these qualifications leads to full Membership (MCSI) and, eventually, individual Chartered status either as a Chartered Member or a Chartered Fellow. For more information about how these qualifications can further your career, visit cisi.org/qualifications or telephone 020 7645 0777.



Bond & Fixed Interest Markets

Dominic Meade **Merit**

Fund Management

Laura Breakwell, Chartered FCSI
Samuel MacEay
Sandiren Ramsamy, Chartered MCSI

Global Operations Management

Jamie Hale
Debbie Hartley MCSI
Joseph Stuart Teasdale MCSI
Ramesh Tunga ACSI

Private Client Investment Advice & Management

David Armit **Distinction**
Nikolai Baev ACSI **Merit**
Laura Bampfyld
Mathew Bate MCSI
Katie Birchall **Merit**
Harrison Boar **Merit**
Kate Boswell ACSI **Merit**
James Bougeard ACSI **Merit**
Julius Bozzino **Merit**
Nicholas Brandram ACSI **Merit**
Ermana Calella
Ben Chandler, Chartered MCSI
Antoine Chemali ACSI
Dominic Chisholm-El Saad MCSI **Merit**
Rupal Chohan ACSI **Merit**
Sarah Louise Clarke **Merit**
William Colville **Merit**
Alistair Crichton ACSI
Mark Croft ACSI
Rebecca Djanogly **Distinction**
Hugh Duff **Merit**
Tim Erlam MCSI
Adam Ewing
Thomas Farr
Alistair Felton **Merit**
Louise Fernandes **Distinction**
Lucas Gaynor ACSI **Merit**
Jamie Gill ACSI
James Green ACSI
Rachel Kay Greenaway ACSI
Bianca Griffiths, Chartered MCSI
Josh Grootenhuis
Martin Guilbert, Chartered MCSI
Peter Hamid **Merit**
Russell Hammond ACSI **Distinction**
Michael Harms
Margaret Elaine Henshaw
Joshua Hewitt, Chartered MCSI **Merit**
Stephen Hicks ACSI
Ben Hinds **Merit**
Benjamin Holdsworth **Merit**
Mark Hollinworth
James Hunter-Jones, Chartered MCSI **Merit**
Ashleigh Ingram **Merit**
Nataliya Izotova
Henry Johnstone ACSI **Distinction**
Mark Jones
Maya Karia
Gourav Katyal

Daniel Kay **Merit**
Nathalie Kedem ACSI **Distinction**
James Kidston MCSI
Howard Kippax
Richard Le Queleneq ACSI
Anthony Liot, Chartered MCSI **Merit**
Jonathan Lord
Murdo MacLennan **Merit**
Jack Mahoney **Distinction**
Gabriel May **Merit**
Nicholas Michaels **Distinction**
Gabriella Mimran **Distinction**
William Morgan
Oliver Morrison ACSI **Merit**
Antony Moyes
Charlotte Nisbet
Robert Oliver **Merit**
Callum O'Rourke **Merit**
Alexandra Passingham
Graham Pearce
Samuel Penderbury **Merit**
Igor Petreanu ACSI
James Potts
Carl Pugh ACSI **Distinction**
Adrian Rafa **Distinction**
Myles Renouf ACSI **Merit**
Andrew Reynolds **Merit**
Isabel Riera Hortelano **Merit**
Lucy Ritchie ACSI **Merit**
Roger Roberts **Merit**
James Robey
Emily Robson ACSI **Distinction**
James Robson ACSI
Leah Ronayne **Distinction**
Victoria Rooke **Distinction**
Robert Royle ACSI **Merit**
Toby Russell
Daniel Ryan ACSI **Merit**
Ivar Sala
Helen Schmitt ACSI **Distinction**
Nuala Sherry ACSI **Merit**
Shing Fung Sin
Gavin Smith ACSI **Merit**
Daniel South ACSI **Distinction**
Thomas Spencer ACSI **Merit**
Zoe Spencer-Small **Merit**
Simon Starkey
Thomas Starkie **Merit**
Barry Stewart
Abi Stidworthy **Merit**
Anthony Stilwell ACSI
Ben Stoves ACSI
Alex Sumner, Chartered MCSI **Merit**
Tina Thackery, Chartered MCSI **Distinction**
Patrick Thomas
Melissa Thorogood **Distinction**
Chris Usher **Merit**
Heather Walker, Chartered MCSI
Christopher Ward
Giles Wellington
Katie White
Christopher Williams **Merit**
Ramsay Wilson
Thomas Wooden **Distinction**
David Worrall, Chartered MCSI
Jake Wright ACSI
Phoebe Wrigley ACSI **Distinction**
Tung Leung Wu **Merit**

Regulation & Compliance

Adebola Adeyemi ACSI
Matthew Allaway

Keyuri Amin **Merit**
Lucy Barr
Sarah Bentley
Amy Blundell ACSI
Marta Bokiej
Ciaran Bridges
Nauroze Brohi ACSI
Yannick Brunner
Lee Camp MCSI
Dena Chadderton
Alice Chia
John Coffey
John Commins
Michael Conduah
Mihaela Adina Costache
Julie Crawford
Rosemary Crowley
Ewa Cwiek
James Doyle ACSI
Natalie Emmington-Thomas
Nina Emordi
Ihuaku Geraldine Ahu Ezech ACSI
Joao Ferreira
Rohan Gokhale
Anthony Goldstone ACSI **Merit**
Lewis Gurry
Clement Halimi
Karl Henderson
Steven Huish
James Hume
Ugochukwu Okoronji Idika
Stephen Jackson ACSI
Efthimos Kamvysis
Susan Kelly
Andrew Kniveton
Jennifer Lake
Tammy Li
Peter Main ACSI
William Marwick
Walter McCracken
Adam McIntosh
Teresa Miccock
Jessica Murray ACSI
Thomas Oliver
Sunil Patel
Laura Pears
Daniel Phillips
Jatinder Puri
Emilie Jane Rawlins
Richard Reason ACSI
Ivar Sala
Maxime Salter-George
Adam Searle
Dmitriy Serazetdinov
Darren Sirr
Kate Taylor
Philip Taylor
Laura Thurston-Garry
Maryam Totonchi
Yuen Kwan Tso
George Walker ACSI
Rachael Watkins
Marcus West
Alec Whitelaw
Stuart Williams ACSI
Sian Wilson
James Woolmer
Jennifer Young

Financial Markets

Archie Burt ACSI
Thomas Canty ACSI
Catherine Capocci ACSI
William Clarkson ACSI
Harriette Collings ACSI
Nathalie Connell ACSI

Nicholas Cunniffe ACSI **Merit**
Callum Doley
Elie El Khoury **Merit**
Thomas Elliot ACSI
Daisy Francklin **Merit**
Peter Grant ACSI
David Gregson ACSI
William Hough ACSI
William Hughes
Jamie Hunter ACSI **Merit**
Philip Kelly ACSI **Merit**
Michael Kent ACSI
Thomas Kight ACSI
William Matthewman ACSI
Aamna Mobashar
Georgina Morgan
Divakar Padmanathan
Thomas Prusinski
Adam Robin ACSI
Toby Saunders ACSI
John Sturges, Chartered FCSI
Anna Thomas ACSI
William Vaughan ACSI **Merit**
James Walker
Richard Wallace
Shi Wei Wee
Rory Whitmore

Portfolio Construction Theory

Dean Aitchison **Distinction**
Frank Anderson, Chartered MCSI
Matthew Baldwin ACSI
Danielle Bamber ACSI
Hamish Barton MCSI
Peter Beale ACSI **Merit**
Nicholas Bearfield MCSI
Simone Bilton ACSI
Mark Brown ACSI
Ryan Caines MCSI
Alistair Cannings ACSI
Alexander Chittenden **Merit**
William Clarkson ACSI
Veronica Coxwell-Matthewman
James Dawson ACSI
Vincent de Wildt ACSI
Henry Elston ACSI
Robert Feather
Scott Garratley, Chartered MCSI
Jennifer Gilbert MCSI
Rory Goodman ACSI **Merit**
Adam Greendale ACSI
Ben Griffiths, Chartered MCSI **Merit**
Oliver Hall ACSI
Russell Hammond ACSI
Robert Harrison ACSI
Fahad Hassan
Kathryn Hewson, Chartered FCSI
Adam Hilder ACSI
Ceri Hill ACSI
Aimee Hogg ACSI
Thomas Holbrook ACSI **Distinction**
Ross Hunter, Chartered MCSI
Alexander Ingram
Jennifer Innes
Amy Kirby ACSI
Mark Libby ACSI
John MacDonald ACSI
Niall MacDonald ACSI
Peter McCallum, Chartered MCSI
Joshua McCathie ACSI
Alexander McLachlan ACSI **Merit**
John Messer **Merit**
David Michael

Thomas Mors ACSI
James Norrington
Jamie O'Neill ACSI
Oliver Parkes ACSI
Simon Peal
Richard Plowdon, Chartered MCSI
James Pridmore ACSI **Merit**
Kritavirasingh Ramrous ACSI
Nick Rusbridge ACSI
Gurcharan Sahota
Naeem Siddique ACSI
Charlotte Sneddon ACSI
Adam Spring MCSI
Gee Weng Sung MCSI **Merit**
Grant Thomson, Chartered MCSI
Jeremy Twist
Sevan Ulutas
Alwyn van Staden ACSI
Joseph Vaughan ACSI
Martin Wetherill ACSI
Daniel Wynne MCSI
Christopher Yardley ACSI
Andrea Yung

Applied Wealth Management

Thomas Allsup
James Arumainayagam MCSI **Merit**
Thomas Aykin ACSI
Jonathan Baird
Daniel Barnes
Henry Barnes ACSI
Matthew Barwick-Barrett, Chartered MCSI
Charles Bialaszewski ACSI
Iain Broxup MCSI
Sarah Butchart
Brendan Butler ACSI
Benjamin Carder MCSI
Philip Chambers, Chartered FCSI
Stuart Chilvers ACSI **Merit**
Paul Collinson, Chartered MCSI
John Cornwall ACSI
Sandra Dailidyte ACSI **Merit**
James Daly ACSI
Guy De Zulueta MCSI
John Dickson ACSI
Ed Donati MCSI
Hugh Draycott ACSI
Amanda-Jayne Edwards ACSI
Donald Galbraith **Merit**
Charlotte Garner ACSI
Rafe Garvin A'Court ACSI
Rosemary Gates MCSI
Lewis Giaramita, Chartered MCSI
Gareth Goodson ACSI
Shabbir Gulamali, Chartered MCSI
Steven Haines ACSI **Merit**
Zahran Haque ACSI
Terence Hearne MCSI
Ei May Htaik ACSI
Charles Inledon ACSI
James Irvine-Fortescue ACSI **Merit**
Matthew Jones
Steven Jones ACSI
Thomas Lawrence ACSI
Thomas Ledger ACSI
Rory Lees-Millais ACSI
Craig Leslie
Frederick Lower, Chartered MCSI
Gail Main
Andrew Maxwell
Michael McGowan,

Corporate Finance Strategy & Advice

Kiren Asad
Luke Bath
Umto Choji **Merit**
Robert Cowans **Merit**
Thomas Edwards
Jerry George **Merit**
Matthew Haines **Merit**
Violeta Katzova
Edward Le Fluffy **Merit**
Jack Eduard Leggett **Distinction**
Diya Luhar
Konstantinos Pavlou
Rob Pettican
Adam Rogers **Merit**
Jagdeep Simon Singh

Diploma in Financial Planning - Financial Plan Assessment

Jeremy Fisher CFP™ MCSI
James Lee CFP™ MCSI
Nicholas Marsh CFP™ MCSI
Will Selwyn CFP™ MCSI
Michael Shepherd CFP™ MCSI
Matthew Smith CFP™ MCSI
Richard Waddams CFP™ MCSI
Graham Wingar CFP™ MCSI
Charles Wood CFP™ MCSI

Chartered MCSI
James Mercier ACSI
David Merriam ACSI **Merit**
Charles Moody **Merit**
Alexander Neilson
Elliott O'Brien ACSI
Jennifer O'Neill ACSI
Raksha Patel
Oliver Perry
Qian Qi Quan ACSI
Rebecca Rogers ACSI
Stuart Ryan, Chartered MCSI
Victoria Scotcher **Merit**
Felicity Selcoe, Chartered MCSI
James Shackell ACSI
William Smyth-Osbourne ACSI
Luke Springthorpe **Merit**
James Thornhill ACSI
Andrew Topping ACSI
Harrison Turner
Annabel Watson ACSI
Isobel Whalley ACSI
Christopher Wheatley MCSI
Samantha Wood ACSI
Matthew Worton ACSI

Corporate Finance Techniques & Theory

Angus Abbott **Merit**
Emerson
Burke-Murphy **Distinction**
Marinos Charalampos **Merit**
Drummond Clark **Distinction**
Christopher Collins ACSI
Paul Hollingshead ACSI
Osman Khan
James Melvin **Merit**
Jack Minns **Distinction**
Andrew John Moss
Matthew Mowat ACSI **Merit**
Antony Nicol
Mohamed Salah
William Sumner **Merit**

CFP™, CERTIFIED FINANCIAL PLANNER™ and CFP® are certification marks owned outside the U.S. by Financial Planning Standards Board Ltd. Chartered Institute for Securities & Investment is the marks licensing authority for the CFP marks in the United Kingdom, through agreement with FPSB.