

Biography - Robert Reid

Robert Reid APFS CFPcm Chartered Financial Planner; is a Director of Syndaxi Financial Planning; a fee based firm of Chartered Financial Planners based in the heart of the City in London close to the Tower of London.

Born in Scotland, Robert entered the financial services sector in 1976, and has since 1985 provided personal financial planning advice initially in Scotland; from 1993 he returned to London where he had worked in the 80's.

He is a past President of the Personal Finance Society (PFS www.thepfs.org); and the Chairman of Practitioners Advice Committee – European Financial Planning Association (EFPA www.efpa-europe.org). Robert led the successful project which secured the Chartered Financial Planner title for the CII/PFS. He is currently a Vice President of the CII (www.cii.co.uk) and Insurance Institute of London (IIL) and is a member of Council of both CII and IIL.

Robert is Diversity champion for the Insurance Institute of London.

Robert is the Readers editor of Money Marketing [UK's leading Financial Advice Weekly Newspaper] he has previously worked with the Financial Times and writes extensively on market conditions and on technical planning issues. Robert is a regular speaker at events in UK, Europe, the Far East and North America.

Robert is an Associate of the Chartered Insurance Institute (ACII); an Associate of The Personal Finance Society (APFS), a Certified Financial Planner (CFP); a Chartered Financial Planner and an Accredited Adviser with Resolution (www.resolution.org.uk) all by examination.

In October 2008 Robert was the recipient of The Widows Lifetime Achievement Award for 2008, an award from Scottish Widows in recognition of his work at the PFS and the work he has done to improve the adviser industry. The Widows awards were launched in 2006 and are an opportunity for the life and pensions industry to recognise success and achievement in the financial adviser community. The Lifetime Achievement Award is given to the financial adviser who has given the most to financial services over his or her life.

In 2013 he was awarded the prestigious Chartered Insurance Institute Bridgewater award which recognises “exceptional and distinguished service” to the CII.

Last amended March 2015