

Matthew Smith

Managing Director /
Chartered Financial Planner



Matthew's Professional Designations

Trust & Estate Practitioner (TEP)
Associate of the Society of Will Writers
Fellow of the Personal Finance Society (PFS)
Chartered Fellow of the Chartered Institute of Securities & Investments (CISI)
Chartered Financial Planner
Certified Financial Planner
Chartered Wealth Manager

Matthew's Qualifications

STEP Diploma in Trusts & Estates
MSc Financial Planning & Business Management
Advanced Diploma in Financial Planning
Diploma in Regulated Financial Planning
Level 6 Diploma in Financial Planning (CISI)
Certificate in Discretionary Investment Management
Securities Advice & Dealing (J12)
Investment Management Certificate

www.buckinghamgate.co.uk

When you speak to Matthew about Estate Planning, his passion and enthusiasm are obvious. Inspired to establish an estate planning focused business following a near-death experience on his honeymoon, he co-founded Buckingham Gate and has never looked back.

Matthew's passion is in helping families cut through the complexity that can sometimes surround Estate Planning and providing effective Estate Planning solutions that simplify the estate for loved ones, minimise Inheritance Tax liabilities and protect the family assets for generations to come.

Matthew is one of the most highly regarded Estate & Financial Planning professionals in the UK with over 130 5-star reviews from clients on the Vouched For website. Matthew has an enviable list of qualifications and awards in the Estate & Financial Planning sectors and is regularly featured in the media to talk about estate and financial planning matters.

In addition to his Estate Planning work with clients, Matthew is also a Chartered Financial Planner, a Chartered Wealth Manager and a Certified Financial Planner Professional and provides regulated Financial Planning advice on Retirement Planning and Investment Management as a Wealth Management Partner with True Potential Wealth Management LLP. If you would like to work with Matthew on your Retirement Planning or Portfolio Management, he will provide a separate client agreement and terms of business for this work.

Matthew is married to Katherine and has 2 young children. When he rarely has a few moments to himself, you can find him attending live music events and running laps around his local neighbourhood.



BUCKINGHAM
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