

ON THE ROAD

TRAVELLING WITH IAN HORNE, BHAVNA KOLI AND ASHLEY THOMAS-WALSH

FRESH FACE

VLOG STAR McGUIGAN TAKES PLANNING TO THE PUBLIC

At first glance, you might think Jessica McGuigan took an easy route by going into financial planning. After all, her father Jason is the managing partner of Oxford-based Critchley Financial Planning, which employs over 120 staff.

But that was not the case for the younger McGuigan. She originally had to start out as a member of temporary staff within Critchley Financial Planning's admin department. And to begin with, McGuigan had no idea what she wanted to do. Originally, she tells me, she 'just wanted to help out'.

However, it was not long until she realised she wanted to become an adviser just like her dad. 'I think it was when I started meeting clients. It's such a people-person job and the majority of it is made up of helping clients and making a difference to their lives,' explains McGuigan. From that point, she decided to complete her qualifications, move into a paraplanning role and eventually transition into advising.

As every adviser will know, sitting exams and working towards financial planning qualifications can be stressful and challenging. McGuigan had the added challenge of balancing her time between work, studying and caring for her now six-year-old son, Isaac. 'It was especially difficult because I wanted to do it in a short period. I did my diploma in about 18 months. It was quite intense,' she says.

McGuigan shows true passion for working in financial services and making a difference to people's lives. It

is apparent in the way she speaks about the profession and her enthusiasm when meeting clients. 'It's the satisfaction of being able to explain something to a client that they didn't initially understand,' she says. 'You can get doctors and dentists who have spent eight years at university and don't understand their pension,' she adds.

CONTRIBUTING TO FINANCIAL LITERACY

However, McGuigan has one vexation. 'I get frustrated when we have to turn people away when they don't meet our minimums. I think a lot of big firms are like that,' she says. 'Where do those people get advice from?'

This was the motivation for McGuigan to start a video blog series on LinkedIn. In the series, she explains financial concepts in a simple way to cater for those who cannot get financial advice for whatever reason. Her idea is to create an offering for non-clients, regardless of whether they have the money to pay advice fees. McGuigan stresses the need for everyone to be financially literate. It is an interesting initiative but also telling of where the profession needs to go.

She has also run successful school visits and plans to do more. 'It was also because of my son,' she explains. 'I realised how much financial education can benefit pupils.' She has also taken part in career days to help promote financial advice as a career option for young people.

McGuigan plans to continue reaching out to young people to help them become more financially literate. 'I want to start an Instagram account from here. I will do short videos explaining things and try to reach out to people who may need it. ■

BHAVNA KOLI



CHARITY WORK

I went skydiving with my dad for his 50th and as a firm we raised over £2,300 for Alzheimer's UK.



FIRST JOB

I used to be a stable girl, working on the yard from about 10 or 11 years old.



CAREER AMBITION

I'm working towards being chartered and then later down the line I'd love to have my own firm.

