

PERSONAL PROFILE

Personal Details

<u>Forenames:</u>	Robin William	<u>Surname:</u>	Keyte
<u>Date of Birth:</u>	02 / 11 / 1970	<u>Marital Status:</u>	Married
<u>Nationality:</u>	British	<u>Children:</u>	2

Employment History

Present Employer: Towers of Taunton (Financial Services) Ltd, Chartered Financial Planners

Date Joined: 01 / 10 / 1996

Qualifications:

01 / 2008	ISO 22222 Personal Financial Planning
06 / 2007	CERTIFIED FINANCIAL PLANNER ^{CM}
12 / 2006	Chartered Financial Planner
10 / 2006	J04 Pension Funding Options paper
04 / 2006	J05 Pension Income Options paper
04 / 2006	CF2 Investment & Risk paper
06 / 2002	APFS (Associate of the Personal Finance Society)
04 / 2002	G30 <i>Advanced</i> Business Financial Planning paper
10 / 2001	H25 <i>Advanced</i> Holistic Financial Planning paper
04 / 2001	G70 <i>Advanced</i> Investment Portfolio Management paper
01 / 2001	MSFA (Member of the Society of Financial Advisers)
10 / 2000	AFPC (Advanced Financial Planning Certificate)
10 / 2000	G20 <i>Advanced</i> Personal Investment Planning paper
10 / 1999	G10 <i>Advanced</i> Taxation & Trusts paper
10 / 1998	G60 <i>Advanced</i> Pensions paper
10 / 1997	FPC (Financial Planning Certificate)

Positions Held: Director, Supervisor, Compliance Officer, Training & Competence Officer and Pensions Transfer Specialist (all current).

Responsibilities: Advising private clients, corporate clients and trustees. Monitoring of regulatory compliance and training & competence.

Specialist Areas: Detailed technical knowledge in all areas of pensions, and in investment and tax planning.
Interested in Socially Responsible Investment (SRI), founder member of the Ethical Investment Association (EIA) and member of the United Kingdom Social Investment Forum (UKSIF).

Other Information: There is also (or has been) an involvement with the following industry groups:
EIA where Robin is currently the Chair
UKSIF where Robin is on the board and sat on the Retail Sub-Committee
Financial Services Skills Council (Working Group) Generic Financial Advice
British Standards Institute (Technical Committee) Personal Financial Planning
Financial Services Business Ethics Forum & Fair Money Ltd
Wessex Reinvestment Trust & London Rebuilding Society

Educational History

Universities: Loughborough University (10/94 – 9/96)
Imperial College, London University (10/89 – 9/94)

Qualifications:

09 / 1996	PhD in Chemistry
09 / 1993	MSc in Chemical Research
09 / 1993	DIC (Diploma of Imperial College)
09 / 1992	ARCS (Associate of the Royal College of Science)
06 / 1992	BSc in Chemistry

Interests

Playing golf; watching rugby & cricket; walking; travelling & spending time with my family.

Biography

Dr Robin Keyte

Director of Towers of Taunton (Financial Services) Ltd

Director of UK Social Investment Forum (UKSIF)

Chair and co-founder of the Ethical Investment Association (EIA)

Co-founder of Fair Money

Director & co-founder of Watson Ward Keyte

Robin Keyte has been a director of Towers of Taunton (FS) Ltd since 1997, and joined the company after completing a PhD in chemistry. He is fee-based and is both a Chartered Financial Planner and a CERTIFIED FINANCIAL PLANNER ^{CM} certificant, and has been awarded ISO 22222 for Personal Financial Planning.

Robin represents / has represented the interests of UKSIF/ EIA in:

- the Financial Services Authority financial adviser exam review, ultimately getting ethical / socially responsible investment included in the syllabus content, such that now new financial advisers have to study an entire chapter on the subject.
- the International Standard for the Competencies of a Personal Financial Planner. He sits on a BSI Technical Committee and has got ethical / socially responsible investment included in the wording of the draft standard.
- the National Occupational Standard for Generic Financial Advice. He sat on the Financial Services Skills Council working group that drafted the standard.
- correspondence with HM Treasury, the Financial Ombudsman Service and the Financial Services Authority, with a view to raising awareness of ethical investment amongst the financial advisory community.

In addition, Robin was also a founder of Fair Money, a working group formed out of the FSA Business Ethics Forum, which aimed to bring about change in financial services leading to greater customer focus, a better deal for consumers and greater financial inclusion.

Out of this came Watson Ward Keyte, a new enterprise with social aims focused on money coaching and peer support groups.

Robin also sits on the Financial Mechanisms Working Group of the Wessex Reinvestment Trust, a local Community Development Finance Institution (CDFI), and is also working with Investing for Good and the Social Stock Exchange in the establishment of an exchange for unquoted social investments.

Robin has worked with the Community Finance Solutions section in the Department of ESPaCH at Salford University on the creation of a Masters Course for Community & Ethical Finance and the running of a Michaelmas school on the subject in 2006.

Finally, in December 2006 an investment case study was published in Which? magazine using one of Robin's clients and which named Robin as the adviser concerned and quoted him. More recently Robin took part in the Money Box Live programme on Radio 4 with Paul Lewis on 7 May 2007 as one of the panel of specialists, and featured again in Which? magazine in their November 2007 issue on the subject of Paying for Financial Advice.