para-sols
paraplanning solutions

# Grant Callaghan

HEAD OF PARAPLANNING PARA-SOLS

## My journey.

I wasn't really sure what I wanted to do after university and wanted to keep my options open by doing my degree in Business Management. I was attracted to working in finance or the financial side of business and knew that my strongest skills in general are in writing and problem solving.

It took a lot of searching but I did end up finding something that I thought was the only role in finance that offered a mixture of writing, solving problems through a bit of investigative work and a sense of doing something that has an impact you can see. I knew at this point I had to pursue Paraplanning as a career option.

I haven't looked back in the five years since this point, and love the process of working through a client case going through the following process:

- Having a look at the background of the client and what is going on in their life
- Consider with the adviser what options are available to the client and what impacts these will have
- Investigate the identified options and determine appropriate solutions to use
- Produce a report to the client outlining all the above in an easy to understand way (stripping out the jargon in the financial services industry)

I've recently passed enough exams to get Chartered status and, while a lot of work, loved the process of gaining qualifications each step of the way and being able to demonstrate a commitment to developing my level of professional standard.

I think the ongoing sense of being challenged is what I like the most. Things are always changing in this world and while I've only been in the industry five years, the landscape feels so different from when I started. There's no certainly no way you can rest on your laurels in this type of environment which keeps everything exciting. In more recent times I've been helping the next cohort of paraplanners develop from scratch and have enjoyed being on their journey as much as my own.

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VITAL STATS

Age: 29

Quals: (DipPFS) (APFS) Chartered Financial Planner