

# CURRICULUM VITAE

MARK S. HOLT

## **Education**

1987 – 1992	Standish Community High School
1992 – 1994	Winstanley College of Technology
1994 – 1996	University of Central Lancashire

## **Grades and Qualifications**

4 A-Levels (Including Maths, Further Maths & Economics)  
Financial Planning Certificate FPC Paper 1  
Certificate for Financial Advisors CeFA papers 2 & 3  
CeMAP Fully Qualified  
Investment Advice Certificate Papers 1 & 2  
CIMA (Chartered Institute of Management Accountants) PQ  
Diploma for Financial Advisors (QCA Level 4)  
'Statement of Professional Standing' issued by London Institute of Banking & Finance (LiBAF)

## **Employment Details**

2015 – date	Frenkel Topping Ltd	Commercial Director
2013 – 2015	Frenkel Topping Ltd	Senior Consultant/Head of Litigation Support Services
2011 – 2013	Frenkel Topping Ltd	Senior Consultant
2008 – 2010	Sterling Holt Limited	Managing Director
2004 – 2008	Avertis Risk Solutions	Business Consultant
2002 – 2004	Newleaf Limited	Director of Financial Services
2000 – 2002	JGFS	Financial Advisor
1998 – 2000	Barclays Life Assurance	Financial Advisor
1996 – 1998	Nelson Money Managers	Financial Support

## **Relevant Experience**

- 20 Years qualified experience providing Financial Advice to retail, personal injury, clinical negligence and corporate clients.
- I have prepared in excess of 200 Claimant Reports and Joint Statements for the Court, on the value of the loss of retirement benefits within personal injury and clinical negligence claims.
- Highly experienced in evaluating the suitability of the use of Periodical Payments in the structuring of awards.
- Regularly provide training to Barristers and Solicitors alike on the methodology and merits of Periodical Payment Orders.
- Personally involved in advising claimants at settlement in complex cases, value in excess of £350m total quantum.
- Instrumental in the design and implementation of Frenkel Topping training seminars to Counsel & Solicitors including "Quantum Leap – Maximising Damages" 2011.
- Demonstrable experience of FSA and 'Treating Customers Fairly' regime.
- Regular guest lecturer to AvMa, APIL, MASS and SIA.