



**MR IAN JAMES  
MACKENDRICK**  
FPFS, CFP, LLAA

## FELLOW & CHARTERED FINANCIAL PLANNER

### EXPERT INFORMATION

Claimant age: All

Report turnaround 4  
weeks

Face to face and remote  
appointments on a case by  
case basis

### EXPERT RATIO

85% Claimant

10% Defendant

5% Joint

### CONTACT

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## CURRENT ROLE:

Expert Witness, Times Top Advisor 2021, Fellow and Chartered IFA and Founder of Paladin Financial Experts

## CASES RELATING TO:

- Pension Loss
- Loss of Earnings
- Accommodation (Post RvJ)
- Cost of Financial Advice
- Periodical Payments / PPO / Form of Award Reports
- Damages Calculations and Settlement Assessment Reports
- Fatal Accidents; Loss of Dependency; Lost Years Claims
- Financial Modelling/Planning
- Investment Performance Management
- Wealth Management
- Cashflow Analysis for Court approval

## EXPERT WITNESS EXPERIENCE:

Ian has acted as an expert witness on hundreds of cases, providing expert reports and commentary on Pension Loss, Loss of Income, Accommodation (Post RvJ), Cost of Financial Advice, Periodical Payments and the financial structure of damages awards.

He can attend JSM's and can also help assess settlement offer viability. Pre-settlement, Ian is instructed with quantum ranging from as little as £50,000 to those in excess of £40m. He is also trusted by solicitors and barristers involving child cases, where the child's money may be better managed outside of the Court Funds Office.

He is regularly invited to lecture and provide training to the OPG, Charities, Law firms, Barristers and their supporting bodies in an approachable style that can help complex subject matters become understandable.

Ian also offers a free initial chat/viability check service.

## FINANCIAL EXPERIENCE:

Having trained as a Counsellor, Dementia Friend and Chartered Financial Planner with over 30 year's financial expertise, Ian is uniquely positioned to specialise and advise the most vulnerable people in the UK, their families and legal advisers. Ian also holds the advanced CII 'inclusive financial planning' exams - the kitemark for advising people with vulnerability.



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S35 9ZX



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He provides a detailed financial plan and advises upon the management and investment of damages awards and finances of the most vulnerable people in the UK and is often called upon to support applications to court assessing the suitability of COP decisions and their financial viability.


He has helped care for over £750m of client's valuable assets and designing a suitable proposition around their unique needs. He has been asked by the OPG to help the court of protection visitors understand financial arrangements within the COP, help identify financial abuse and has regularly lectured on his subject matter with Senior figures.

Post settlement, Ian is recommended and instructed regularly by litigators about to settle, or by COP and professional trust teams. His expertise means that he is used to carefully handling situations with a wide range of claimants, including minors, elderly and brain-injured clients and takes pride in providing advice tailored to the individual needs of each person, depending on their financial sophistication as well as the nature and severity of their injuries

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