

Meet the Paraplanning Panel

Alan Gow

Panel Chair

Owner and Paraplanner of Argonaut Paraplanning



I'm Alan and I'm one of the directors at Argonaut Paraplanning, which I set up in 2011. I've been on the panel for about 9 years and it's helped force me to challenge myself, getting involved in things I never thought I'd do, like speaking on stage! My focus this year is on our report writing guide, which will be launched in May, and finding interesting speakers and informative topics for our monthly Paraplanner Labs and the Purely Paraplanning Conference. My passion is bringing Suitability Reports out of the dark ages, focusing on consumer duty and client understanding.

[Add Alan on LinkedIn](#)

Frazer Cronin APFS

Head of Learning and Development/ Paraplanner at First Wealth



As Head of Learning and Development at First Wealth, I am responsible for helping members of the team transition from administrators to paraplanners. I am passionate about enabling the team fulfil their potential and creating an environment that allows them to flourish.

I joined the PFS Paraplanner Panel as I want to build a community of Paraplanners who are forward thinking and are looking to drive positive change through collective power. It is quite common for Paraplanners to not see paraplanning as a career in itself, and instead focus on moving on to being a Financial Planner. However, I want to help and keep top talent in the Paraplanner role across the profession and show that it can be a rewarding job in itself.

Within my existing role at First Wealth, I am also Paraplanner that looks after clients across a range of different segments, such as entrepreneurs, high net worth individuals, retirees and professionals. Working different types of clients has given me experience across a number of different planning opportunities and allowed me to polish my skills; skills that I am excited to be able to share with others.

[Add Frazer on LinkedIn](#)

Hannah Wynick

Managing Director at Core Financial Paraplanning Limited



I'm Hannah and I run Core Financial Paraplanning Limited. I live in Leeds with my partner Ben and our dog Eddie. Being one of the new members of the PFS Paraplanner Panel, I know that there are a lot of great things already happening and in the pipeline that I cannot wait to be a part of. In addition to these, I want to encourage and champion more education in schools to encourage young people to want to make other areas of Financial Services (such as paraplanning) a career option and choice, rather than a job that they just fall into.

[Add Hannah on LinkedIn](#)

Phil Greenwood

Head Of Technical Consulting at EQ



I'm Phil, I'm a Fellow of the PFS and have been paraplanning in various guises for around 10 years, the last 5 have been heading up paraplanning departments and getting quite heavily involved in how the company operates on a wider basis; from process, to training, to technology and most things in between. Through this I've seen first-hand how pivotal paraplanners have become.

I am focussed on helping to define the scope of the role and providing guidance to the paraplanning community on best practice. I am passionate about paraplanning as a profession and would love to help provide the next generation of paraplanners a solid foundation to build their careers on.

[Add Phil on LinkedIn](#)

Laura Royle

Paraplanner & Chartered Financial Planner at Rathbones Financial Planning



I have been a Paraplanner at Rathbones since May 2022, after six years as a Paraplanner at Sanlam Wealth Planning (now atomos).

I am a member of both the CISI and Personal Finance Society and have completed my Advanced Diploma in Financial Planning, achieving Chartered status with the PFS. I am a qualified Pension Transfer Specialist with additional qualifications in insurance, mortgages, equity release arrangements and long-term care planning, as well as ESG and social impact investing.

As a Paraplanner, I am responsible for researching and formulating complex advice, supporting Financial Planners in helping individuals, families and trusts achieve their goals and objectives.

I joined the PFS Paraplanner Panel around June 2023 in order to meet and learn from more members of the paraplanning community, reinforce the position of paraplanning as a career in its own right and establish inclusive support for paraplanners at all stages of their careers and study paths.

Having received a late diagnosis of ADHD and recently fibromyalgia, I am an advocate for neurodiversity and wider disability inclusion. I am a co-lead of the Rathbones 'Abilities Count' DE&I network.

[Add Laura on LinkedIn](#)

Zara Okoro

Senior Paraplanner, JG Paraplanning

[Add Zara on LinkedIn](#)

Rachel Whittaker

Technical Director, Oakmere Wealth Management



I'm Rachel and I entered the profession in 2017 and have been paraplanning for the last 5-6 years. I am diploma qualified and am currently working towards Chartered. I am not a natural mathematician like many Paraplanners, but I have always loved writing a good report, so I enjoy being able to challenge the stereotype that we are all maths geeks!! I love what I do and am really keen to raise the profile of Paraplanning as a 'stand-alone' profession. Joining the PFS Paraplanners and getting the opportunity to work with some brilliant like-minded people is therefore really exciting!

I am particularly passionate about developing and maintaining processes that support vulnerable clients. I believe that every client deserves personalised care and guidance, and I would like to empower others to promote best practices for client care, ensuring that we all contribute to a more inclusive financial landscape.

[Add Rachel on LinkedIn](#)

Luke Sparkes

Head of Technical Paraplanning, In Partnership Financial Advisers Limited

Hi, I'm Luke and I'm the Head of Technical Paraplanning at In Partnership. I've been Paraplanning for the past four years and became a Fellow and Chartered with the Personal Finance Society in 2022. I joined the PFS Paraplanning Panel to raise the profile of the profession, as well as to champion the education of the profession both within Schools and also new entrants to the industry. Having joined the PFS Paraplanning Panel in August 2024 as one of the newer members, I want to really help drive the good standards of all the fantastic initiatives including both the Suitability Report Writing Guide and Paraplanner Labs Sessions. I live in Horsham with my wife and young son and enjoy both reading and keeping healthy in my spare time.

[Add Luke on LinkedIn](#)