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Biographical Notes

Carla Brown MSc, FPFS, Certs CII (MP & ER),
Chartered Financial Planner
Chair (Member Director)

Carla is Managing Director of Oakmere Wealth Management Ltd and Director of CL Wills and Estate Planning.

Carla is a Chartered Financial Planner, Fellow of the PFS, graduated from Loughborough University with an MSc in Wealth Management in 2018, is accredited as a later life adviser with the Society of Later Life Advisers (SOLLA), and holds a Certificate in Relational Financial Planning. In 2019, Carla won the inaugural SJP 'Chartered Financial Planner of the Year' award and in 2021 went on to win the prestigious PFS 'Chartered Financial Planner of the Year 2021/22'. She has been nominated for multiple other awards.

Prior to starting her own business in 2011, Carla spent 15 years working with HSBC and Bradford & Bingley as an Independent Financial Adviser, and Cheshire Building Society as a Financial Consultant. She has also gained governance experience as a Trustee and Director of DMPL Ltd, a resident's association for a private housing development, and as a school governor.

Eddie Grant BA (Hons), MSc Finance, FPFS, FRSA,
Chartered Financial Planner, Chartered Wealth Manager, European Financial Planner.
Institute Director

Eddie is a passionate advocate for the financial planning profession. A Past President of the Personal Finance Society (PFS) and its longest-serving Non-Executive Director.

He serves on the board of the European Financial Planning Association and is a UK Government appointed Cabinet Office Disability and Access Ambassador for Insurance. A past Vice President of the Chartered Insurance Institute, a current Vice President of the Insurance Institute of London and a Liveryman of the Worshipful Company of Insurers. As a former Director of Technical Connection, Eddie led and contributed deep technical expertise—supporting over 500,000 industry-wide queries annually in tax, trust, and pensions.

A lifelong champion of apprenticeships and professional development, Eddie chairs the advisory board of the Finance in Society Research Institute (FISRI), driving evidence-based policy and industry collaboration to expand access to financial services and tackle financial exclusion.

Beyond finance, Eddie brings the same curiosity and care to everyday life. He's been married to Marina for over 36 years and recently qualified as a Tea Sommelier.

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Debbie Mitchell, Dip PFS
Institute Director

Debbie Mitchell is a director of Aberdeen based financial planning firm, Atholl Scott Financial Services, where she has enjoyed a 32 year career. Before joining the firm, Debbie worked with Bowring Financial Services, part of the Marsh group, and had an excellent technical grounding during five years with Scottish Amicable.

She is a past Chair of the North Scotland Region Personal Finance Society and has been involved with the Insurance Institute of Aberdeen since 2008 serving as its first female President from 2011 to 2013.

Debbie is a former Engagement Member of the CII Board and Chairs the Board of Trustees of the Aberdeen and North East Scotland Music Festival, despite having no discernible musical talent.

Gill White
Institute Director

Gill joined the CII in early 2020, initially as Learning and Assessment Director.

Her role has grown to include the CII's marketing functions as well as being responsible for taking the CII's learning content forward to meet the needs of professionals. In January 2024, she additionally took on the role of Acting CEO of the CII Group, prior to Matthew Hill joining in April 2024.

Previously, Gill was Business and Markets Development Director for the Chartered Institute of Personnel and Development (CIPD). She has held a variety of Head of Learning & Development roles at Vodafone, Xchanging and SSP, and operational roles for Whitbread and Greenall's.

Gill holds Chartered Director status and is also a Fellow of both the Institutes of Directors and CIPD.

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Mike Crane ACII, Chartered Insurer
Institute Director

Mike is a Chartered Insurer with over 30 years' experience working in the insurance sector.

He joined AXA in 2025as SME & Specialty Director. He is also Chair of the Motor Insurers' Bureau, which is responsible for helping people injured by uninsured and hit- and-run drivers.

Previously, he was Managing Director of LV=Broker, part of Allianz Group which he led for 8 years. During this time the business went through significant transformation, becoming a leading Broker Personal Lines Insurer.

Prior to his appointment as MD, Mike was Commercial Director leading the successful development of the LV='s Commercial Business. Recognising the importance of high professional standards, he led LV=broker in coming a Chartered Insurer.

Matthew Hill
Institute Director

Mr Hill joined the CII in April 2024. Prior to that he was Chief Executive and executive Boad Member at the Legal Services Board (LSB).

He started his career in the Civil Service, working in a wide range of areas over a twenty year span. His brief has included food safety, animal health, alcohol, civil contingencies, broadcasting, gambling, creative industries and healthcare regulation.

Before joining the LSB, Mr Hill was Executive Director, Strategy at the General Dental Council, and prior to that he was Director, Regulatory Risk & Analysis at the Gambling Commission.

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Ian Callaghan BA (Hons), FCII, Chartered Insurance Practitioner
Institute Director

A Chartered Insurance Practitioner with over 40 years experience within the Insurance industry, Ian has worked in both General and Life Insurance and has held senior positions at several Brokers including Swinton, Broker Network and RAC. He is currently Insurer Relations Director at Kingfisher Group. Ian has also run an MGA dealing in both General and Life Insurance as well as working as a Strategy Manager at Britannia Building Society.

Ian has been a Past President of both the North Wales and Chester Insurance Institute and Kendal Insurance Institute. He has served on the CII Board as a CII Constituency Board Member as well as holding positions on CII Nominations and Remuneration Committee, CII Representative Council, and both Local Institute National Forum and Regional Local Institute Forum.

Ian holds a degree in Financial Management and in his spare time, he is a School Governor, follows Manchester United as well as having an avid interest in historical maps.

Kate Gannon FPFS, Chartered Financial Planner
Member Director

Kate is a Chartered Financial Planner, a Fellow of the PFS and a Chartered Wealth Planner with CISI. She is also a founder of Themis Wealth Management in Cornwall. Kate won Chartered Financial Planner of the Year in 2016/17 and was named Role Model of the Year at the Women in Financial Advice Awards, for pioneering the 4-day working week in her practice.

Kate previously spent 20 years with Barclays Bank, and has been Treasurer Trustee for Age UK Cornwall and the Isles of Scilly for the last 8 years. She also mentors and attends schools in her local area to promote the financial planning profession on behalf of the PFS.

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Craig Palfrey FPFS, Chartered Financial Planner
Member Director

Craig has been a Certified Financial Planner since 2007, and is also a Chartered Wealth Manager, accredited with Society of Later Life Advisers for Retirement advice. He is an Education Champion for the PFS, mentor, and regularly speaks at professional and public events on aspects of financial planning.

Craig has been Managing Director of Penguin Wealth Planners since 2010, where he leads the Financial Planning Team, and Compliance Oversight. Penguin is a 10-time winner of the Estate Planning Firm of the Year, awarded by Solidus Independent Estate Planning, and has been a finalist at the Great British Entrepreneurship Awards.