

CEO.

David Cassidy, Chief Executive Officer, WEALTH at work

David has almost 30 years experience of providing financial advice and investment management to individuals approaching, at or in retirement.

From 1983 to 2003 he was CEO of Nelson Money Managers Plc which provided advice to the employees of many large organisations. The firm managed over £1 billion on behalf of 20,000 individuals the majority of whom were in retirement.

In 1998 the company was acquired by the US firm Stillwel Financial (now Janus Capital) and David served as a director of Stillwel International and Stillwel UK helping develop and oversee development and acquisition strategies whilst continuing in his role of CEO of the UK advice and management business.

Subsequently David was approached by JPMorgan to establish its UK advisory business, JPMorgan INVEST where he was CEO from its development and subsequent launch in 2005 to the MBO in 2009. During this time he chaired the JPMorgan Asset Management UK Risk Committee and was a member of the European Risk Committee

David has been involved in regulation for over 15 years. He was chairman of the Securities Institute Investment Advice Certificate (IAC) standing committee (1993-1996), a Director of the Investment Management Regulatory Organisation (IMRO) (1994-2000) and Chairman of the Investment Ombudsman Committee (1997-2000). Following the introduction of the Financial Services and Markets Act, David became a member of the Financial Services Authorities Training Advisory Panel, responsible for setting the standards of qualifications for investment advisers and managers under the new regime. He was also a member of FSA's Regulatory Decisions Committee from its inception in 2000 to 2008 during which time he was involved with many of FSA's high profile industry investigations in areas such as mis-selling and market abuse.

David has acted as a consumer advocate and been a regular commentator on personal finance issues in the press and broadcast media with regular appearances on the money channel, sky news and BBC radio 4 & 5.