my wealth
WEALTH at work

Ian Copelin, Investment Director

Ian Copelin was appointed as the Investment Director in 2009 following a management buy-out (MBO) of Wealth at Work Limited. Ian heads a team that is responsible for the management of over £1bn on behalf of over 10,000 clients. As Investment Director, Ian is responsible for both the investment strategy and asset allocation of the assets-under-management (AUM) as well as having executive powers, duties, and responsibilities for the company.

Prior to this Ian held senior positions with some of the industry's most respected asset managers. He was a Vice President Investment Manager with JPMorgan Asset Management and before this an Investment Manager at Close Wealth Management. Ian began his career at JPMorgan Chase where he specialised in derivative products for some of the world's largest sovereign investors.

Ian has over 20 years of experience in the investment industry, having managed UK, European, North American, fixed income and multi-manager portfolios.

Ian is a member of both the UK Society of Investment Professionals (CFA) and the Chartered Institute for Securities & Investment (CISI) and has a BA (Hons) in Business Studies.

Ian is also a director of Wealth at Work Trustees Limited and a member of the Investment Management Committee.

Peter Quayle, Fund Manager

Peter Quayle is responsible for UK equity research at Wealth at Work Limited.

He joined the company in 2009 and is responsible for the design and structure of the in-house quantitative research systems. Peter has relationships with numerous public companies and industry intermediaries which further strengthens the company's qualitative research.

Having started his financial services career with Towry Law he moved to Investec in 2006 where he managed investment portfolios on behalf of private clients, trusts, companies and pension funds; investing in equities, cash, bonds, and collective investments.

Peter is a Member of the Chartered Institute for Securities & Investment, and holds both IMC and CFP.

Jonathan Wiseman, Fund Manager

Jonathan is responsible for International Collective Investment research at Wealth at Work Limited.

Jonathan graduated from the University of Liverpool with a degree in Economics and started his career with Tilney Private Wealth Management in 2004, working closely with both international and onshore financial advisers. In 2006 Jonathan transferred to the London office to work with the head of collective research. In 2007 Tilney was acquired by Deutsche Bank, at which time Jonathan joined the 'Business to Business team'. In 2010 Jonathan moved back to Liverpool and joined XCAP in Cheshire, where he had full responsibility for all discretionary mandates.

Jonathan joined Wealth at Work Limited in January 2012 and has further developed the company's collective investment selection process. He has relationships with numerous intermediaries and meets with fund managers on a regular basis.

Jonathan has the CISI Masters in Wealth Management, is IMC qualified and is a Chartered Fellow of the Chartered Institute for Securities & Investment.

Ciaren McShane, Income Analyst

Ciaren is responsible for fixed interest investments at Wealth at Work Limited.

Ciaren graduated from the University of Liverpool with a Bachelor's Degree in Mathematics and a Master's Degree in Finance. Ciaren is IMC qualified and a CFA® charterholder.

Ciaren joined Wealth at Work Limited in 2013, having previously worked as an analyst for an energy broker.

Phil Young, Investment Analyst

Phillip is responsible for assisting with International Collective Investment research as well as being responsible for cash management at Wealth at Work Limited.

Prior to joining the company in 2014, Phillip had acquired over 10 years industry experience working for Rathbone Brothers, Pershing Limited and Legal & General Investment Management in a variety of operational roles.

Phillip is IMC qualified, is a Chartered Fellow of the Chartered Institute for Securities & Investment and has a BA (Hons) in Business and Economics. He is currently studying towards the Chartered Wealth Management Qualification.

Gareth Sedgwick, Investment Analyst

Gareth graduated university in 2014. Shortly after graduating, Gareth developed a keen interest in financial markets and quickly perused a career in the wealth management industry. Gareth joined the investment team at Wealth at Work Limited in 2016 and is responsible for assisting in the management of the advisory portfolios and conducting research into our collective investments.

Prior to joining the company, Gareth joined Brewin Dolphin where he worked for a group of investment managers and was in charge of assisting his colleagues in maintaining client relationships and reviewing client funds. A year later, Gareth joined Rathbone Investment Management in Liverpool city centre. During his time at Rathbones, Gareth, along with his team was in charge of reviewing and reporting on client's tax liabilities and ensuring that client positions where accurate, allowing the investment teams to make educated decisions on their client's behalf.

Gareth is currently studying towards gaining the Investment Management Certificate.

Zachary Ryan, Trainee Investment Analyst

Zachary is responsible for assisting Peter Quayle in UK equity research at Wealth at Work Limited.

He joined the company in 2017, shortly after graduating The University of York with a Bachelor’s degree in Economics.

Zachary is IMC qualified and a candidate in the Chartered Financial Analyst programme.