Q&A

Charlene Coulbeck
Financial Planner

Please explain your current role at Nugenis?

As a Financial Planner my role is not to just look after our clients' investments. The bigger picture for me as a Planner is to properly understand my clients' long-term goals and aspirations for the future, and for us to build and maintain a plan on how to get there.

Please give us a brief outline of your career before joining Nugenis?

I started out as an office junior for a Financial Adviser in 2009, and quickly decided that I wanted to progress further and started to take exams. I became a Paraplanner a few years' later, and although I enjoyed the technical aspects of this I wanted to be the one to meet clients and build the relationship with them. I became a qualified Financial Planner in 2018, became Accredited with the Society of Later Life Advisers in 2020, and was awarded Chartered status by the Chartered Insurance Institute (CII) in 2021.

What attracted you to join Nugenis?

I found Nugenis after making the decision to relocate to South Wales from my home in Yorkshire, after 2 years of being in a long-distance relationship with my partner in Cardiff. It was important to me to find a company I could see myself still being with in 5, 10 and more years' time, and one that places the same level of importance as I do on building long-term relationships and a personal approach to Financial Planning.

How do you relax outside of work?

I have lots of hobbies (too many probably!) but I enjoy relaxing at home with my family, and you will usually find me with either a book in hand or something craft-related like crochet. Out and about I enjoy live music and gigs, as well as finding good restaurants to enjoy a decent steak and a glass of wine!

What is the best piece of advice you have been given?

Be yourself. I try to ensure all my clients know that they are dealing with me on a genuine level and feel they are getting the real me.