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Biographical Notes



Christine Elliott
Chair (Lay Member)

Christine has a rich depth of experience gathered over a career spanning financial services, leisure, journalism, culture, communications, education, property, healthcare, policing, and technology.

Christine currently holds non-executive roles with the ExCo Group, Positive Planet UK Advisory Board, Sonas Group, Independent Office for Police Conduct, The Health and Care Professions Council, and Editors' Code of Practice Committee. Formerly, she was Chief Executive of The Institute for Turnaround and Transformation for a decade, and Director of Bletchley Park. She has a wealth of board experience, having held dozens of other executive and non-exec and chair positions. Her track record includes transformation, change, innovation, complex problem-solving, regulation, systems-thinking and collaboration.



**Carla Brown MSc, PFPS, Certs CII (MP & ER),
Chartered Financial Planner
President (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, she 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.



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Daniel Williams BSc (Hons), DipPFS, CertPFS (DM)

Member Director (Vice President)

Daniel has been an Independent Financial Adviser with Morgan Williams & Co since 2016 and sits on the firm's investment committee.

Daniel is a specialist in Cyber Crime avoidance, leading his firm's work in the space and educating other Financial Advisers and Financial Services Professionals, in part as a member of the PFS ScamSmart initiative. He is an Education Outreach Ambassador for the Yorkshire Region and an

Education Champion for the PFS 'My Personal Finance Skills' initiative, running workshops in

schools across the UK. In 2022, Daniel was named the PFS 'Financial Education Champion of the Year' and has been identified as a CityWire Top 35 Next Generation Planner on three occasions.

Prior to becoming an IFA, Daniel was Managing Director of creative design agency, Tailor and Baker, and an international headhunter, with RMI Consultants Ltd.



**Ben Wright FPFS, Chartered Financial Planner
*Member Director***

Ben is Chief Innovation Officer and MD of Progress at business lifecycle agency Melo. As an ex financial planner, Ben now works with ambitious businesses to help them scale and prepare for a successful exit. Having worked in Bancassurance, as a financial planner, in fund management, with white labelled platform solutions and on the exec board of a financial planning network, Ben has the benefit of seeing the profession through many lenses.



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Elizabeth Bastin
Lay Director

Elizabeth is currently a Vice President for a major global Bank, she has a solid background in financial regulation, compliance, and legal risk, spanning over 10 years. She has advised various major financial institutions on compliance and legal risk matters, including high profile investigations commissioned by the FCA and other global Regulators. She specialises in advising financial institutions on how to meet their obligations under Deferred Prosecution Agreements (DPA) and has successfully brought compelling evidence before Regulators to enable Financial Institutions to close out DPAs.

Elizabeth is also a financial inclusion and social mobility advocate; she is the co-founder of a social enterprise, which provides financial education and employability support to individuals from underserved backgrounds. Her commitment to creating and instilling change for the underserved has led to her achieving Fellow status from the Royal Society of Arts.



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

Edward is an experienced senior executive, leading adviser support teams across the profession. He is a Finance in Society Research Institute advisory board member, a body formed in 2022 to develop high quality research to support policymakers and the industry to improve access to financial services and tackle financial exclusion.

A passionate advocate of the financial planning profession, Edward is a Chartered Financial Planner, Chartered Wealth Manager, Fellow of the PFS with a Masters focused on supporting clients with vulnerable circumstances. He is a past president of the Personal Finance Society, serving six years on the PFS Board, past vice president of the Chartered Insurance Institute and Insurance Institute of London, previous chair of the TISA Tax Committee, current CII Pension Trustee and Liveryman of the Worshipful Company of Insurers.

During his extensive career, Edward has sought to support, mentor and lead the development of initiatives to build consumer confidence and trust in the value of financial advice.



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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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Mathew Mallett
Institute Director

Mat joined the CII in late 21022. He covers digital, systems, technology projects and customer services.

He is a multi-award-winning technology executive, board adviser and speaker with international experience in successfully delivering digital and technology strategy and transformations. His background is across oil and gas, retail, central government, law enforcement, and the space sector, leveraging skills in building digital and technology strategies that align with business outcomes, whilst addressing technological debt.

He supported NHS Scotland's 111 service during peak demand in 2020 at the height of the Covid-19 pandemic, by spearheading the accelerated design and deliver of an AI Chatbot solution.



Mike Crane ACII, Chartered Insurer
Institute Director

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

He is Chair of the Motor Insurers' Bureau, which is responsible for helping people injured by uninsured and hit- and-run drivers.

Until June 2024 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.



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Matthew Hill
Institute Director

Mr Hill joined the LSB in August 2019 as Chief Executive and executive Board member. 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. Before that, he was Director, Regulatory Risk & Analysis at the Gambling Commission.



Trevor Edwards
Institute Director

Trevor joined the CII in 2019 as the CII Group Finance Director having held senior finance roles in the financial services sector in UK and the Caribbean.

Trevor has worked in insurance audit at Big Four firms and has experience in corporate risk management, financial reporting and technical accounting. Over the course of his career, he has been involved in complex transactions including acquisitions, capital restructuring and taxation.

In addition to being a Chartered Accountant, Trevor also holds a Masters degree in Business Administration and a Certificate Level insurance qualification from the Chartered Insurance Institute.



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Don MacIntyre
Interim PFS CEO

Don MacIntyre has led an impressive career, with more than 25 years of experience in economic development and a decade of expertise in director/CEO roles. He has an extensive portfolio in delivering multi-year strategies, business planning and ‘turn around’ programmes.

Prior to joining PFS, Don provided strategic leadership as Interim CEO of newly formed self-regulating body, the UK Cyber Security Council, guiding the team through its “start-up” phase transforming the transitional team to full operational status.

He built the council from the ground up, securing Charitable status in the first 90 days to include achieving Privy Council for Chartered Status. Don worked collaboratively alongside the Treasury, Cabinet Office and DCMS and supported the government consultation on long term legislation for the cyber security profession.

In his three years as Interim Global Director at Women’s Integrated Sexual Health (WISH), he managed a global team of 15, won over £2300m worth of commercial business and set up a £132 turnover business in 17 countries. Prior to this, he took on the role of Interim Commercial Director / Deputy CEO at OPM Group, a research and consultancy organisation, where he designed and

implemented a business development activation plan which saw him build a new team and increase turnover by £1.8m in 12 weeks.

A strong communicator and collaborator, Don has frequently taken the initiative and produced high-quality outcomes in every role he has filled.