

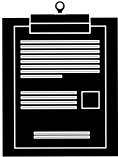
**Tracey Underwood Founder**

**Tel: 07939147307 Email: [tracey@pacesolutionsuk.com](mailto:tracey@pacesolutionsuk.com)**

**Visit: [www.pacesolutionsuk.com](http://www.pacesolutionsuk.com)**



## Bio



I have been involved in financial services for the last 20 years.

During this time, I have held a variety of technical and senior management roles including heading the technical department within an award winning financial planning practice where I spent four informative years understanding Financial Planning and delivering a high quality service. In 2005, I moved into Operations within a large IFA organisation and was quickly promoted to Operations Director. It was at this company that I set upon revolutionising the business proposition.

This resulted in an overhaul of all business processes including administration, accounts, branding, compliance, client services and financial planning divisions.

## Experience



PACE Solutions

In 2009, I established myself as a business consultant, focusing on Operational requirements within financial planning firms and firms wanting to make the transition to financial planning. My strength lies in providing 'hands on' assistance to firms wanting to make changes but perhaps lack the time and/or capacity to successfully implement.

I took a short break in 2015 joining a large financial planning practice as Managing and latterly Operations Director before re-establishing PACE Solutions in January 2019.

I have presented at the Institute of Financial Planning regional meetings (now CISI) and have worked alongside other leading Financial Planning consulting firms including FP Advance and Albion Strategic. I have also contributed to New Model Adviser, IFA Magazine and other industry leading publications.

## Qualifications



Certified Financial Planner<sup>TM</sup>

CISI Chartered Wealth Manager

Advanced Diploma in Financial Planning

Chartered Financial Planner

STEP Administration of Trusts Certificate

ILM Level 5 Award in Leadership and Management

## Skills



I know what makes a financial planning firm work having practical experience working within some of the best financial planning firms in the UK. I am skilled in proposition, people and compliance, the combination of which help take businesses to the next level.

## Interests



My passion outside of work is travelling to cultural destinations and undertaking sporting challenges.

I have undertaken the 24-hour National Three Peaks Challenge twice and cycled 253 miles in 18 hours, all for charitable causes. I am also addicted to Crossfit and have a mean deadlift, lifting over twice my bodyweight.

