



Norman Dalgleish PhD Statistics and long term climate change (Geology & Geophysics) 1996

Who is your current employer and what do they do?

A law firm in Edinburgh

The law firm also provides other services to clients including financial planning, investment management and tax advice.

What is your job title and what does the job entail?

Senior Financial Planner

I provide financial planning advice to individuals, trusts and charities. This involves meeting with them to discuss their goals and objectives, and then helping them to structure their affairs in a sensible and efficient manner to achieve these. It can also include technical advice on their pensions and investments, as well as advice on protecting against Inheritance Tax.

How did you achieve your current position?

I consider my career to have gone in discrete steps, each time building on the skills that I have obtained in my latest role.

1. As I neared the end of my undergraduate degree I was simply looking for an interesting role for a “numerate” person and when I was offered the PhD position I grabbed it.
2. My PhD added “research” to my list of skills, and this helped me to get a job for a large supermarket chain (Safeway), analysing the performance of their stores.
3. Working for Safeway I studied some accountancy exams (though I had no intention of ultimately becoming an accountant) and this, coupled with the experience I gained on the job, meant that I could add “financial analysis” to my list of skills.
4. As a “numerate” person with “research” and “financial analysis” skills I got a job with Scottish Widows as a trainee fund manager. I worked there for several years, then moved to Aegon to do a similar role.
5. Ultimately I was made redundant from Aegon. At that time I wanted to continue broadly what I was doing, but to work more closely with individuals as I believed I had the “personal skills” to communicate with and advise people directly. I therefore added the “personal finance” knowledge to the other skills I already had by qualifying as a financial adviser and worked as an Independent Financial Adviser (IFA) for 3 years.
6. I then believe that all of the above skills allowed me to obtain the role that I have now where many of my clients depend upon my research skills (to keep up to date with areas of change, particularly legislative), my “numeracy” and “financial analysis” skills to work out how these might affect an individual and how best to structure their affairs, and I need to be able to communicate what can be quite technical points to the client in a manner which they can understand and to allow them to make an informed decision.

How do you feel you have used the skills and/or knowledge developed during your research degree in your career to date?

My PhD clearly gave me research skills, but also taught me how to work on my own and also in a team (I was the sole “expert” in my area of specialism, within a wider multi-disciplinary group). These skills have definitely helped in my career progression. Even now, 15 years after I completed my PhD, I find it also helps professionally due to the level of respect it engenders in others.

Other qualifications

BSc Mathematics and Statistics, 1991, University of Edinburgh