



Sarah Hogan FPFS

Chartered Financial Planner. Fellow of the Personal Finance Society

Company Director, KBA The Financial Planning Company

Chair of UK MCC for MDRT from 2020 to 2022.

Contact Information

Email: sarah.hogan@kbafinancial.com

Professional Summary

I am a Chartered Financial Planner, Fellow of the Personal Finance Society and the Company Director and Owner of KBA The Financial Planning Company, where I lead a dedicated team in providing specialized financial advice. With a focus on helping clients plan for retirement, manage their businesses, and navigate succession planning, I am passionate about empowering individuals to achieve their financial goals.

Professional Experience

Chartered Financial Planner, Fellow and Company Director, KBA The Financial Planning Company.

Manchester, UK

March 2007 - Present

- Lead and manage a team of financial advisors to deliver comprehensive financial planning services.
- Specialize in retirement planning, business financial planning, and succession planning.
- Recognized for exceptional leadership and client-focused service.

Key Achievements:

- Won Team Leader of the Year and Financial Adviser of the Year in the North West at the 2019 Professional Adviser Women in Financial Advice Awards.

- Nominated for Inspirational Leader of the Year, Adviser of the Year, and Mentor of the Year at the 2023 Professional Adviser Women in Financial Advice Awards.
- Nominated for Mentor, Role Model and Financial Adviser Northwest in the 2024 Professional Adviser Women in Finance Awards.
- Multiple previous awards, accolades and nominations including being featured in the Financial Times, Professional Adviser, Money Marketing and EVA awards.

Education & Qualifications

- Chartered Financial Planner
- Fellow of the Personal Finance Society (PFS)

Professional Skills

- Retirement Planning
- Business Financial Planning
- Succession Planning
- Client Relationship Management
- Team Leadership and Mentorship

Personal Interests

When I'm not working, I enjoy spending time with my family, cooking, travel, playing the drums, dancing, singing and keeping fit.

Community & Engagement

I believe in the power of community and enjoy engaging in local events and initiatives. My work often involves helping generations of families plan their financial futures, and I take pride in building lasting relationships with clients and their families. We support multiple local charities, and I was also the former UK chair of the Openwork Fundraising committee from 2021 to 2023. In recent years we have supported homeless charities, food banks, local hospices and charities to help get people back into work, children's skin charities and also grants to help build community kitchens in The Gambia.