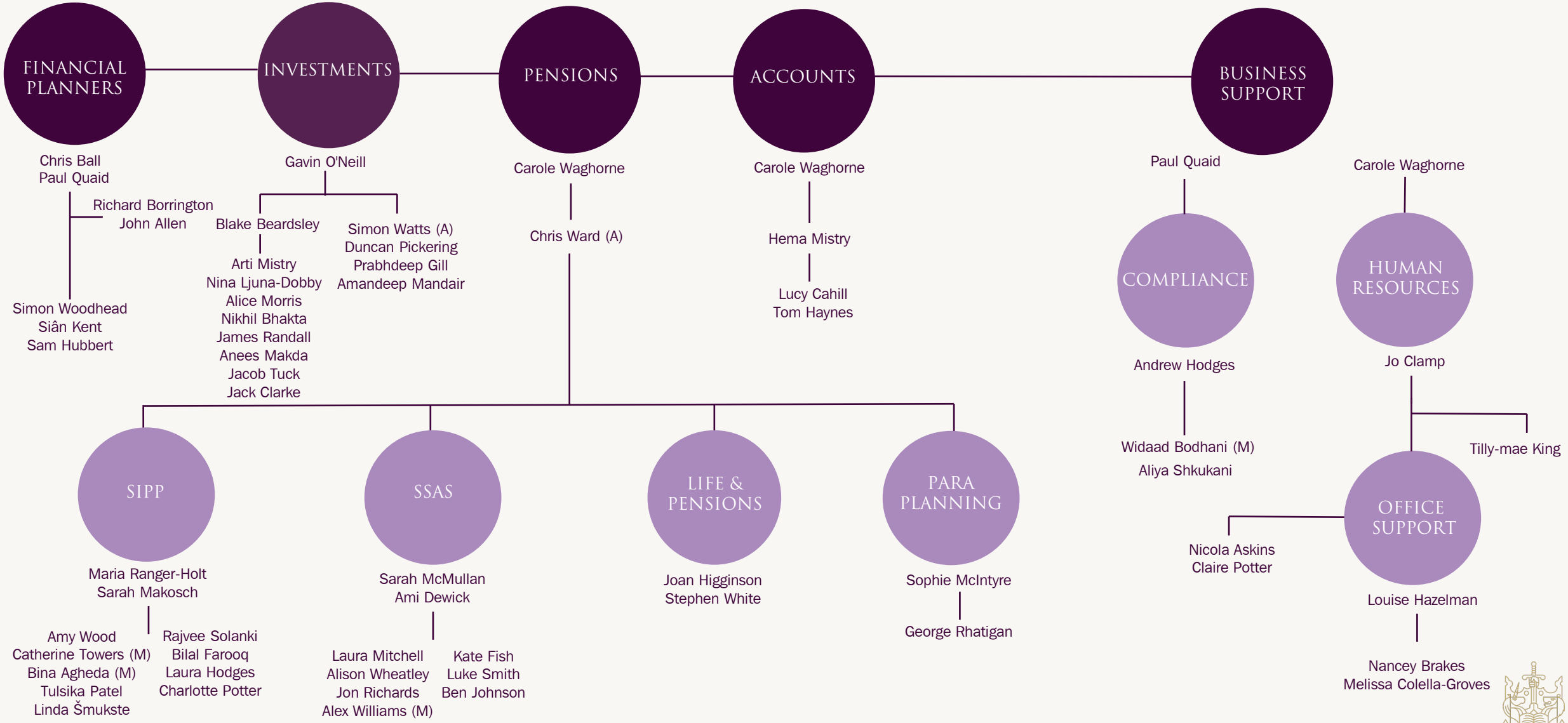
ORGANISATION STRUCTURE



(A) Associate (M) Maternity Leave

Partners: Paul Anthony Quaid Limited, Carole Waghorne Limited, Gavin O'Neill Limited, Richard Borrington Limited, Christopher Ball Limited, John-Paul Allen Limited.

Associates: Chris Ward, Simon Watts. Boolers is a trading name of David Booler & Co which is authorised and regulated by the Financial Conduct Authority.

Member of the Association of Member-Directed Pensions Schemes.

BOOLERS

Financial Planners

Chartered

BUSINESS OWNERS

Paul Quaid
FINANCIAL PLANNER
Special Responsibilities:
BUSINESS OVERSIGHT & COMPLIANCE
DD: 0116 240 7083
M: 07734 382 966
pquaid@boolers.co.uk

Carole Waghorne
CHARTERED FINANCIAL PLANNER
Special Responsibilities:
HEAD OF PENSIONS, FINANCE & HR
DD: 0116 240 7093
cwaghorne@boolers.co.uk

Gavin O'Neill
CHARTERED FINANCIAL PLANNER
Special Responsibilities:
HEAD OF INVESTMENTS
DD: 0116 240 7076
goneill@boolers.co.uk

Chris Ball
CHARTERED FINANCIAL PLANNER
Special Responsibilities:
FINANCIAL PLANNING MANAGEMENT
DD: 0116 240 7087
M: 07791 606 416
cball@boolers.co.uk

Richard Borrington
FINANCIAL PLANNER
Special Responsibilities:
FINANCIAL PLANNING & MARKETING
DD: 0116 240 6988
M: 07912 308 312
rborrington@boolers.co.uk

John Allen
FINANCIAL PLANNER
Special Responsibilities:
FINANCIAL PLANNING
DD: 0116 240 7062
M: 07935 448 062
jallen@boolers.co.uk

INVESTMENTS

Simon Watts (A)
SENIOR INVESTMENT MANAGER
DD: 0116 240 6983
swatts@boolers.co.uk

Duncan Pickering
INVESTMENT MANAGER
DD: 0116 240 7060
dpickering@boolers.co.uk

Prabhdeep Gill
TRAINEE INVESTMENT MANAGER
DD: 0116 240 7077
pgill@boolers.co.uk

Amandeep Mandair
TRAINEE INVESTMENT MANAGER
DD: 0116 240 6977
amandair@boolers.co.uk

Blake Beardsley
INVESTMENT TEAM LEADER
DD: 0116 240 7079
bbeardsley@boolers.co.uk

Arti Mistry
INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 240 6985
amistry@boolers.co.uk

Nina Ljuna-Dobby
INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 240 7078
nljuna-dobby@boolers.co.uk

Alice Morris
INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 240 7081
amorris@boolers.co.uk

Nikhil Bhakta
INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 240 7268
nsbhakta@boolers.co.uk

James Randall
INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 240 7063
jrandall@boolers.co.uk

Anees Makda
TRAINEE INVESTMENTS ACCOUNT EXECUTIVE
DD: 0116 240 6975
amakda@boolers.co.uk

Jacob Tuck
GRADUATE TRAINEE IN INVESTMENTS
DD: 0116 240 6971
jtuck@boolers.co.uk

Jack Clarke
GRADUATE TRAINEE IN INVESTMENTS
DD: 0116 240 6989
jclarke@boolers.co.uk

FINANCIAL PLANNERS

Simon Woodhead
CHARTERED FINANCIAL PLANNER
DD: 0116 240 7266
M: 07960 493 538
swoodhead@boolers.co.uk

Siân Kent
CHARTERED FINANCIAL PLANNER
DD: 0116 240 7065
M: 07741 903 302
skent@boolers.co.uk

Sam Hubbert
FINANCIAL PLANNER
DD: 0116 240 7098
M: 07884 836 816
shubbert@boolers.co.uk

PARAPLANNING

Sophie McIntyre
HEAD OF PARAPLANNING & RESEARCH
DD: 0116 240 7260
smcintyre@boolers.co.uk

George Rhatigan
PARAPLANNER
DD: 0116 240 6980
grhatigan@boolers.co.uk

PENSIONS

Chris Ward (A)
PENSIONS MANAGER
DD: 0116 240 7092
cward@boolers.co.uk

Joan Higginson
LIFE & PENSIONS ACCOUNT EXECUTIVE
DD: 0116 240 7085
jhigginson@boolers.co.uk

Stephen White
LIFE & PENSIONS ACCOUNT EXECUTIVE
DD: 0116 240 7086
swhite@boolers.co.uk

Sarah McMullan
SSAS TEAM LEADER
DD: 0116 240 6970
smcmullan@boolers.co.uk

Ami Dewick
DEPUTY SSAS LEADER
DD: 0116 240 7090
adewick@boolers.co.uk

Laura Mitchell
SSAS ACCOUNTS EXECUTIVE
DD: 0116 240 7091
lmitchell@boolers.co.uk

Alison Wheatley
SSAS ACCOUNTS EXECUTIVE
DD: 0116 240 7084
awheatley@boolers.co.uk

Alex Williams (M)
SSAS ACCOUNTS EXECUTIVE
awilliams@boolers.co.uk

Jon Richards
SSAS ACCOUNTS EXECUTIVE
DD: 0116 240 7089
jrichards@boolers.co.uk

Kate Fish
SSAS ACCOUNTS EXECUTIVE
DD: 0116 240 7269
kfish@boolers.co.uk

Luke Smith
SSAS ACCOUNTS EXECUTIVE
DD: 0116 240 6981
lsmith@boolers.co.uk

Ben Johnson
GRADUATE TRAINEE IN PENSIONS (SSAS)
DD: 0116 240 7075
bjohnson@boolers.co.uk

Maria Ranger-Holt
SIPP TEAM LEADER
DD: 0116 240 7069
mranger-holt@boolers.co.uk

Sarah Makosch
SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 7094
smakosch@boolers.co.uk

Amy Wood
SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 7097
awood@boolers.co.uk

Catherine Towers (M)
SIPP ACCOUNTS EXECUTIVE
ctowers@boolers.co.uk

Bina Agheda (M)
SIPP ACCOUNTS EXECUTIVE
bagheda@boolers.co.uk

Tulsika Patel
SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 7099
tpatel@boolers.co.uk

Linda Šmukste
SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 7061
lsmukste@boolers.co.uk

Rajvee Solanki
SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 7095
rsolanki@boolers.co.uk

Bilal Farooq
SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 7067
bfarooq@boolers.co.uk

Laura Hodges
GRADUATE TRAINEE IN PENSIONS (SIPP)
DD: 0116 240 6973
lhodges@boolers.co.uk

Charlotte Potter
GRADUATE TRAINEE IN PENSIONS (SIPP)
DD: 0116 240 6976
crpotter@boolers.co.uk

BUSINESS SUPPORT

Jo Clamp
HR MANAGER
DD: 0116 240 7088
jclamp@boolers.co.uk

Louise Hazelman
OFFICE MANAGER
DD: 0116 240 7082
lhazelman@boolers.co.uk

Tilly-mae King
HR ASSISTANT
DD: 0116 240 7064
tking@boolers.co.uk

Nancey Brakes
OFFICE MANAGER ASSISTANT
DD: 0116 240 6978
nbrakes@boolers.co.uk

Nicola Askins
RECEPTIONIST/ SECRETARIAL SUPPORT
DD: 0116 240 7071
naskins@boolers.co.uk

Claire Potter
SECRETARIAL SUPPORT
DD: 0116 240 7072
cpotter@boolers.co.uk

Melissa Colella-Groves
GENERAL OFFICE ASSISTANT
DD: 0116 240 6979
mcolella-groves@boolers.co.uk

COMPLIANCE

Andrew Hodges
COMPLIANCE MANAGER
DD: 0116 240 7264
ahodges@boolers.co.uk

Widaad Bodhani (M)
COMPLIANCE ASSISTANT
wbodhani@boolers.co.uk

Aliya Shkukani
COMPLIANCE ASSISTANT
DD: 0116 240 7261
ashkukani@boolers.co.uk

ACCOUNTS

Hema Mistry
FINANCIAL CONTROLLER
DD: 0116 240 7262
hmistry@boolers.co.uk

Lucy Cahill
ACCOUNTANT
DD: 0116 240 7073
lcahill@boolers.co.uk

Tom Haynes
ACCOUNTS & PAYROLL OFFICER
DD: 0116 240 6972
thaynes@boolers.co.uk

(A) Associate (M) Maternity Leave Reception is open Monday to Thursday 8am to 5pm and Friday 8am to 4.30pm