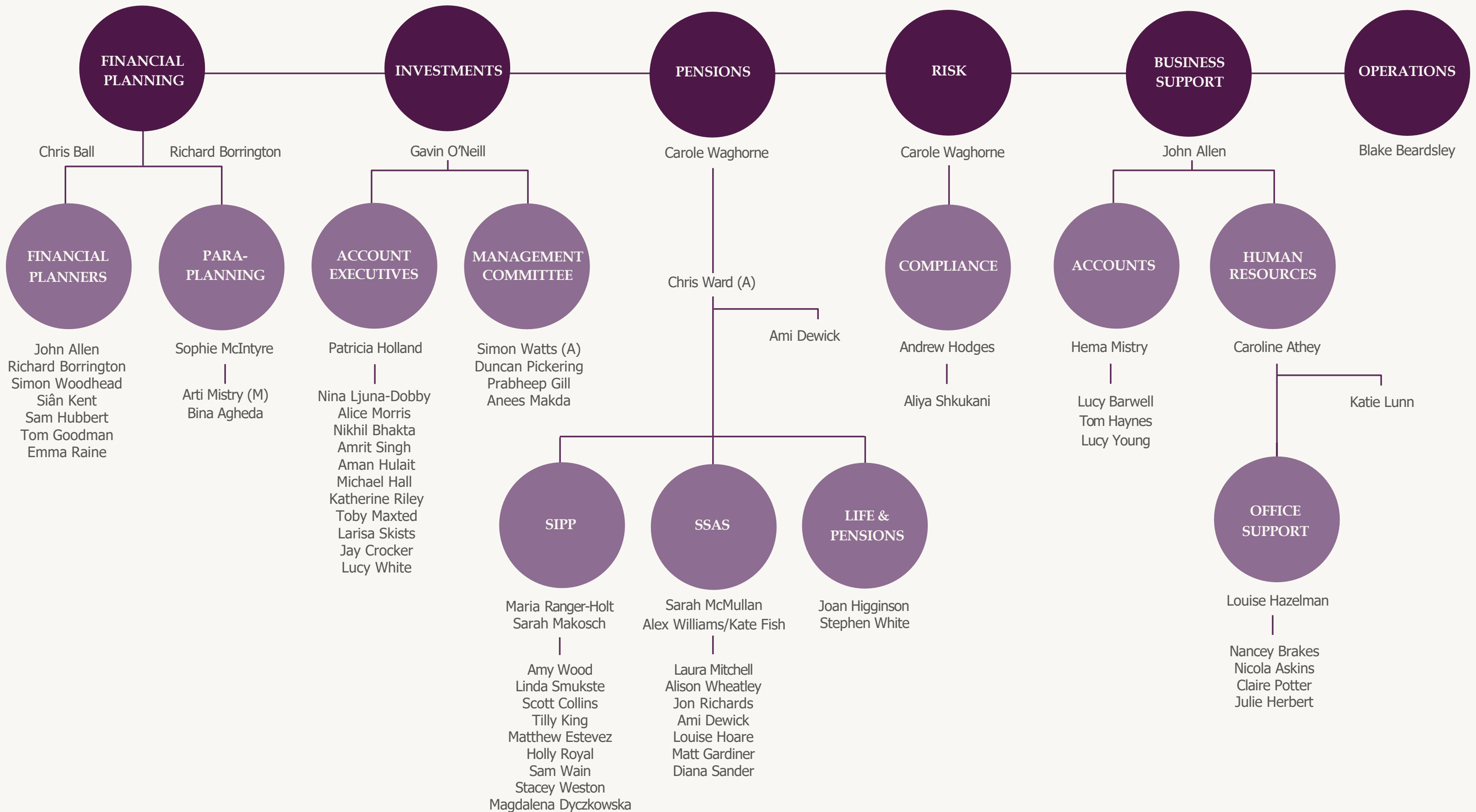


# ORGANISATION STRUCTURE



(A) Associate (M) Maternity Leave

Partners: Carole Waghorne Limited, Gavin O'Neill Limited, Richard Borrington Limited, Christopher Ball Limited, John-Paul Allen Limited. Blake Beardsley 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 Pension Schemes.



Chartered

## BUSINESS OWNERS

---

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

**Carole Waghorne**  
CHARTERED FINANCIAL PLANNER  
Special Responsibilities:  
HEAD OF PENSIONS & RISK  
DD: 0116 240 7093  
[cwaghorne@boolers.co.uk](mailto:cwaghorne@boolers.co.uk)

**Gavin O'Neill**  
CHARTERED FINANCIAL PLANNER  
Special Responsibilities:  
HEAD OF INVESTMENTS  
DD: 0116 2407076  
[goneill@boolers.co.uk](mailto:goneill@boolers.co.uk)

**Richard Borrington**  
FINANCIAL PLANNER  
Special Responsibilities:  
FINANCIAL PLANNING & CLIENT EXPERIENCE  
DD: 0116 240 6988  
M: 07912 308 312  
[rborrington@boolers.co.uk](mailto:rborrington@boolers.co.uk)

**John Allen**  
CHARTERED FINANCIAL PLANNER  
Special Responsibilities:  
FINANCIAL PLANNING & HEAD OF BUSINESS SUPPORT  
DD: 0116 240 7062  
M: 07935 448 062  
[jallen@boolers.co.uk](mailto:jallen@boolers.co.uk)

**Blake Beardsley**  
HEAD OF OPERATIONS  
Special Responsibilities:  
OPERATIONS, CYBER SECURITY & IT  
DD: 0116 240 7079  
M: 07754 298744  
[bbeardsley@boolers.co.uk](mailto:bbeardsley@boolers.co.uk)

## INVESTMENTS

---

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

**Duncan Pickering**  
INVESTMENT MANAGER  
DD: 0116 240 7060  
[dpickering@boolers.co.uk](mailto:dpickering@boolers.co.uk)

**Prabhdeep Gill**  
INVESTMENT MANAGER  
DD: 0116 240 7077  
[pgill@boolers.co.uk](mailto:pgill@boolers.co.uk)

**Anees Makda**  
TRAINEE INVESTMENT MANAGER  
DD: 0116 240 6977  
[amakda@boolers.co.uk](mailto:amakda@boolers.co.uk)

## INVESTMENTS

---

**Patricia Holland**  
INVESTMENT TEAM LEADER  
DD: 0116 240 6989  
[pholland@boolers.co.uk](mailto:pholland@boolers.co.uk)

**Nina Ljuna-Dobby**  
INVESTMENT ACCOUNTS EXECUTIVE  
DD: 0116 240 7078  
[nljuna-dobby@boolers.co.uk](mailto:nljuna-dobby@boolers.co.uk)

**Alice Morris**  
INVESTMENT ACCOUNTS EXECUTIVE  
DD: 0116 240 7081  
[amorris@boolers.co.uk](mailto:amorris@boolers.co.uk)

**Nikhil Bhakta**  
INVESTMENT ACCOUNTS EXECUTIVE  
DD: 0116 240 7268  
[nsbhakta@boolers.co.uk](mailto:nsbhakta@boolers.co.uk)

**Amrit Singh**  
INVESTMENT ACCOUNTS EXECUTIVE  
DD: 0116 240 6984  
[asingh@boolers.co.uk](mailto:asingh@boolers.co.uk)

**Aman Hulait**  
INVESTMENT ACCOUNTS EXECUTIVE  
DD: 0116 240 6971  
[ahulait@boolers.co.uk](mailto:ahulait@boolers.co.uk)

**Michael Hall**  
INVESTMENT ACCOUNTS EXECUTIVE  
DD: 0116 240 7074  
[mhall@boolers.co.uk](mailto:mhall@boolers.co.uk)

**Katherine Riley**  
INVESTMENT ACCOUNTS EXECUTIVE  
DD: 0116 240 7066  
[kriley@boolers.co.uk](mailto:kriley@boolers.co.uk)

**Toby Maxted**  
INVESTMENT ACCOUNTS EXECUTIVE  
DD: 0116 240 7083  
[tmaxted@boolers.co.uk](mailto:tmaxted@boolers.co.uk)

**Larisa Skists**  
TRAINEE INVESTMENT ACCOUNTS EXECUTIVE  
DD: 0116 240 6975  
[lskists@boolers.co.uk](mailto:lskists@boolers.co.uk)

**Jay Crocker**  
GRADUATE TRAINEE ACCOUNTS EXECUTIVE  
DD: 0116 240 7063  
[jcrocker@boolers.co.uk](mailto:jcrocker@boolers.co.uk)

**Lucy White**  
INVESTMENT ADMINISTRATOR  
DD: 0116 240 7265  
[lwhite@boolers.co.uk](mailto:lwhite@boolers.co.uk)

## FINANCIAL PLANNERS

---

**Simon Woodhead**  
CHARTERED FINANCIAL PLANNER  
DD: 0116 240 7266  
M: 07960 493 538  
[swoodhead@boolers.co.uk](mailto:swoodhead@boolers.co.uk)

**Siân Kent**  
CHARTERED FINANCIAL PLANNER  
DD: 0116 240 7065  
M: 07741 903 302  
[skent@boolers.co.uk](mailto:skent@boolers.co.uk)

**Sam Hubbert**  
FINANCIAL PLANNER  
DD: 0116 240 7080  
M: 07884 836 816  
[shubbert@boolers.co.uk](mailto:shubbert@boolers.co.uk)

**Tom Goodman**  
FINANCIAL PLANNER  
DD: 0116 240 6974  
M: 07480 061 701  
[tgoodman@boolers.co.uk](mailto:tgoodman@boolers.co.uk)

**Emma Raine**  
TRAINEE FINANCIAL PLANNER  
DD: 0116 240 7263  
M: 07774 937 442  
[eraine@boolers.co.uk](mailto:eraine@boolers.co.uk)

## PARAPLANNING

---

**Sophie McIntyre**  
HEAD OF PARAPLANNING & RESEARCH  
DD: 0116 240 7260  
[smcintyre@boolers.co.uk](mailto:smcintyre@boolers.co.uk)

**Arti Mistry (M)**  
TRAINEE PARAPLANNER  
[amistry@boolers.co.uk](mailto:amistry@boolers.co.uk)

**Bina Agheda**  
TRAINEE PARAPLANNER  
DD: 0116 240 6980  
[bagheda@boolers.co.uk](mailto:bagheda@boolers.co.uk)

## PENSIONS

---

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

**Ami Dewick**  
PENSION MANAGER'S ASSISTANT  
DD: 0116 240 7090  
[adewick@boolers.co.uk](mailto:adewick@boolers.co.uk)

**Joan Higginson**  
LIFE & PENSIONS ACCOUNTS EXECUTIVE  
DD: 0116 240 7085  
[jhigginson@boolers.co.uk](mailto:jhigginson@boolers.co.uk)

**Stephen White**  
LIFE & PENSIONS ACCOUNTS EXECUTIVE  
DD: 0116 240 7086  
[swhite@boolers.co.uk](mailto:swhite@boolers.co.uk)

## PENSIONS

---

**Sarah McMullan**  
SSAS TEAM LEADER  
DD: 0116 240 6790  
[smcmullan@boolers.co.uk](mailto:smcmullan@boolers.co.uk)

**Alex Williams**  
DEPUTY SSAS TEAM LEADER  
DD: 0116 240 7267  
[awilliams@boolers.co.uk](mailto:awilliams@boolers.co.uk)

**Kate Fish**  
DEPUTY SSAS TEAM LEADER  
DD: 0116 240 7269  
[kfish@boolers.co.uk](mailto:kfish@boolers.co.uk)

**Laura Mitchell**  
SSAS ACCOUNTS EXECUTIVE  
DD: 0116 240 7091  
[lmitchell@boolers.co.uk](mailto:lmitchell@boolers.co.uk)

**Alison Wheatley**  
SSAS ACCOUNTS EXECUTIVE  
DD: 0116 240 7084  
[awheatley@boolers.co.uk](mailto:awheatley@boolers.co.uk)

**Jon Richards**  
SSAS ACCOUNTS EXECUTIVE  
DD: 0116 240 7089  
[jrichards@boolers.co.uk](mailto:jrichards@boolers.co.uk)

**Ami Dewick**  
SSAS ACCOUNTS EXECUTIVE  
DD: 0116 240 7090  
[adewick@boolers.co.uk](mailto:adewick@boolers.co.uk)

**Louise Hoare**  
SSAS ACCOUNTS EXECUTIVE  
DD: 0116 240 6981  
[lhoare@boolers.co.uk](mailto:lhoare@boolers.co.uk)

**Matt Gardiner**  
SSAS ACCOUNTS EXECUTIVE  
DD: 0116 240 7068  
[mgardiner@boolers.co.uk](mailto:mgardiner@boolers.co.uk)

**Diana Sander**  
TRAINEE SSAS ACCOUNTS EXECUTIVE  
DD: 0116 240 7075  
[dsander@boolers.co.uk](mailto:dsander@boolers.co.uk)

**Maria Ranger-Holt**  
SIPP TEAM LEADER  
DD: 0116 240 7069  
[mranger-holt@boolers.co.uk](mailto:mranger-holt@boolers.co.uk)

**Sarah Makosch**  
DEPUTY SIPP TEAM LEADER  
DD: 0116 240 7094  
[smakosch@boolers.co.uk](mailto:smakosch@boolers.co.uk)

**Amy Wood**  
SIPP ACCOUNTS EXECUTIVE  
DD: 0116 240 7097  
[awood@boolers.co.uk](mailto:awood@boolers.co.uk)

**Linda Šmukste**  
SIPP ACCOUNTS EXECUTIVE  
DD: 0116 240 7096  
[lsmukste@boolers.co.uk](mailto:lsmukste@boolers.co.uk)

**Scott Collins**  
SIPP ACCOUNTS EXECUTIVE  
DD: 0116 240 6973  
[scollins@boolers.co.uk](mailto:scollins@boolers.co.uk)

## PENSIONS

---

**Tilly King**  
SIPP ACCOUNTS EXECUTIVE  
DD: 0116 240 7067  
[tking@boolers.co.uk](mailto:tking@boolers.co.uk)

**Matthew Estevez**  
SIPP ACCOUNTS EXECUTIVE  
DD: 0116 240 7061  
[mestevez@boolers.co.uk](mailto:mestevez@boolers.co.uk)

**Holly Royal**  
SIPP ACCOUNTS EXECUTIVE  
DD: 0116 240 7095  
[hroyal@boolers.co.uk](mailto:hroyal@boolers.co.uk)

**Sam Wain**  
SIPP ACCOUNTS EXECUTIVE  
DD: 0116 240 7099  
[swain@boolers.co.uk](mailto:swain@boolers.co.uk)

**Stacey Weston**  
SIPP ACCOUNTS EXECUTIVE  
DD: 0116 240 6976  
[sweston@boolers.co.uk](mailto:sweston@boolers.co.uk)

**Magdalena Dyczkowska**  
TRAINEE SIPP ACCOUNTS EXECUTIVE  
DD: 0116 240 6985  
[mdyczkowska@boolers.co.uk](mailto:mdyczkowska@boolers.co.uk)

## BUSINESS SUPPORT

---

**Caroline Athey**  
HR MANAGER  
DD: 0116 240 7088  
[cathey@boolers.co.uk](mailto:cathey@boolers.co.uk)

**Katie Lunn**  
HR ASSISTANT  
DD: 0116 240 7064  
[klunn@boolers.co.uk](mailto:klunn@boolers.co.uk)

**Louise Hazelman**  
OFFICE MANAGER  
DD: 0116 240 7082  
[lhazelman@boolers.co.uk](mailto:lhazelman@boolers.co.uk)

**Nancey Brakes**  
OFFICE MANAGER'S ASSISTANT  
DD: 0116 240 6978  
[nbrakes@boolers.co.uk](mailto:nbrakes@boolers.co.uk)

**Nicola Askins**  
SECRETARIAL SUPPORT  
DD: 0116 240 7071  
[naskins@boolers.co.uk](mailto:naskins@boolers.co.uk)

**Claire Potter**  
SECRETARIAL SUPPORT  
DD: 0116 240 7072  
[cpotter@boolers.co.uk](mailto:cpotter@boolers.co.uk)

**Julie Herbert**  
SECRETARIAL SUPPORT  
DD: 0116 240 7070  
[jherbert@boolers.co.uk](mailto:jherbert@boolers.co.uk)

## ACCOUNTS

---

**Hema Mistry**  
FINANCIAL CONTROLLER  
DD: 0116 240 7262  
[hmistry@boolers.co.uk](mailto:hmistry@boolers.co.uk)

**Lucy Barwell**  
ACCOUNTANT  
DD: 0116 240 7073  
[lbarwell@boolers.co.uk](mailto:lbarwell@boolers.co.uk)

**Tom Haynes**  
ACCOUNTS & PAYROLL OFFICER  
DD: 0116 240 6972  
[thaynes@boolers.co.uk](mailto:thaynes@boolers.co.uk)

**Lucy Young**  
ACCOUNTS ADMINISTRATOR  
DD: 0116 240 7261  
[lyoung@boolers.co.uk](mailto:lyoung@boolers.co.uk)

## COMPLIANCE

---

**Andrew Hodges**  
COMPLIANCE MANAGER  
DD: 0116 240 7264  
[ahodges@boolers.co.uk](mailto:ahodges@boolers.co.uk)

**Aliya Shkukani**  
COMPLIANCE ASSISTANT  
DD: 0116 240 6979  
[ashkukani@boolers.co.uk](mailto:ashkukani@boolers.co.uk)