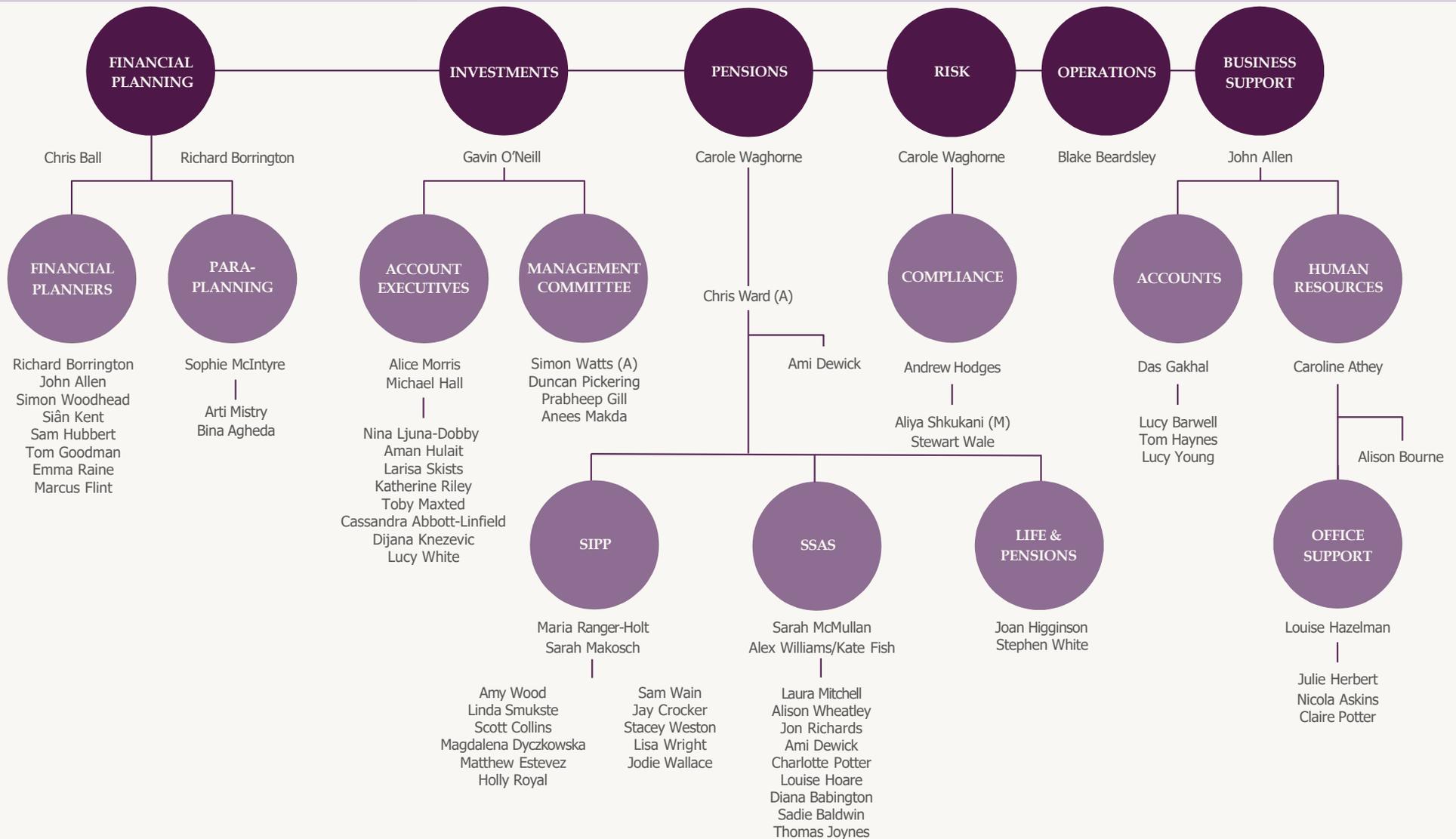


ORGANISATION STRUCTURE

BOOLERS



(A) Associate (M) Maternity Leave

Partners: Carole Waghome 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.



BUSINESS OWNERS

Chris Ball

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

Carole Wagborne

CHARTERED FINANCIAL PLANNER
Special Responsibilities:
HEAD OF PENSIONS & RISK
DD: 0116 240 7093
cwagborne@boolers.co.uk

Gavin O'Neill

CHARTERED FINANCIAL PLANNER
Special Responsibilities:
HEAD OF INVESTMENTS
DD: 0116 2407076
goneill@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

CHARTERED FINANCIAL PLANNER
Special Responsibilities:
FINANCIAL PLANNING & HEAD OF BUSINESS SUPPORT
DD: 0116 240 7062
M: 07935 448 062
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

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

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

Anees Makda

TRAINEE INVESTMENT MANAGER
DD: 0116 240 6977
amakda@boolers.co.uk

Alice Morris

INVESTMENT TEAM LEADER
DD: 0116 240 7081
amorris@boolers.co.uk

Michael Hall

DEPUTY INVESTMENT TEAM LEADER
DD: 0116 240 7074
mhall@boolers.co.uk

Nina Ljuna-Dobby

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

Aman Hulait

INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 240 6971
ahulait@boolers.co.uk

Larisa Skists

INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 240 6975
lskists@boolers.co.uk

Katherine Riley

INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 240 7066
kriley@boolers.co.uk

Toby Maxted

INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 240 7083
tmaxted@boolers.co.uk

Cassandra Abbott-Linfield

INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 240 6987
cabbott-linfield@boolers.co.uk

Dijana Knezevic

INVESTMENT ACCOUNTS EXECUTIVE
DD: 01162407063
dknezevic@boolers.co.uk

INVESTMENTS

Lucy White

INVESTMENT ADMINISTRATOR
DD: 0116 240 7265
lwhite@boolers.co.uk

PARAPLANNING

Sophie McIntyre

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

Arti Mistry

TRAINEE PARAPLANNER
DD: 0116 240 6984
amistry@boolers.co.uk

Bina Agheda

TRAINEE PARAPLANNER
DD: 0116 240 6980
bagheda@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 7080
M: 07884 836 816
shubbert@boolers.co.uk

Tom Goodman

FINANCIAL PLANNER
DD: 0116 240 6974
M: 07480 061 701
tgoodman@boolers.co.uk

Emma Raine

FINANCIAL PLANNER
DD: 0116 240 7263
M: 07774 937 442
eraine@boolers.co.uk

Marcus Flint

ASSISTANT FINANCIAL PLANNER
DD: 0116 2406989
mflint@boolers.co.uk

COMPLIANCE

Andrew Hodges

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

Aliya Shkukani (M)

COMPLIANCE ASSISTANT
ashkukani@boolers.co.uk

Stewart Wale

COMPLIANCE ASSISTANT
DD: 0116 240 7268
swale@boolers.co.uk

PENSIONS

Chris Ward (A)

PENSIONS MANAGER
DD: 0116 240 7092
cward@boolers.co.uk

Ami Dewick

PENSION MANAGER'S ASSISTANT
DD: 0116 240 7090
adewick@boolers.co.uk

Joan Higginson

LIFE & PENSIONS ACCOUNTS EXECUTIVE
DD: 0116 240 7085
jhigginson@boolers.co.uk

Stephen White

LIFE & PENSIONS ACCOUNTS EXECUTIVE
DD: 0116 240 7086
swhite@boolers.co.uk

Sarah McMullan

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

Alex Williams

DEPUTY SSAS TEAM LEADER
DD: 0116 240 7267
awilliams@boolers.co.uk

Kate Fish

DEPUTY SSAS TEAM LEADER
DD: 0116 240 7269
kfish@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

Jon Richards

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

Ami Dewick

SSAS ACCOUNTS EXECUTIVE
DD: 0116 240 7090
adewick@boolers.co.uk

Charlotte Potter

SSAS ACCOUNTS EXECUTIVE
DD: 0116 240 7068
crpotter@boolers.co.uk

Louise Hoare

SSAS ACCOUNTS EXECUTIVE
DD: 0116 240 6981
lhoare@boolers.co.uk

Diana Babington

TRAINEE SSAS ACCOUNTS EXECUTIVE
DD: 0116 240 7075
dbabington@boolers.co.uk

Sadie Baldwin

TRAINEE SSAS ACCOUNTS EXECUTIVE
DD: 0116 502 2356
sbaldwin@boolers.co.uk

Thomas Joynes

SSAS ACCOUNTS EXECUTIVE
DD: 0116 240 6979
tjoynes@boolers.co.uk

PENSIONS

Maria Ranger-Holt

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

Sarah Makosch

DEPUTY SIPP TEAM LEADER
DD: 0116 240 7094
smakosch@boolers.co.uk

Amy Wood

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

Linda Šmukste

SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 7096
lsmukste@boolers.co.uk

Scott Collins

SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 6973
scollins@boolers.co.uk

Magdalena Dyczkowska

SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 6985
mdyczkowska@boolers.co.uk

Matthew Estevez

SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 7061
mestevez@boolers.co.uk

Holly Royal

SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 7095
hroyal@boolers.co.uk

Sam Wain

SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 7099
swain@boolers.co.uk

Jay Crocker

SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 6979
jcrocker@boolers.co.uk

Stacey Weston

SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 6976
sweston@boolers.co.uk

Lisa Wright

TRAINEE SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 6982
lwright@boolers.co.uk

Jodie Wallace

SIPP ACCOUNTS EXECUTIVE
DD: 0116 2406986
jwallace@boolers.co.uk

ACCOUNTS

Das Gakhal

FINANCE DIRECTOR
DD: 0116 240 7262
dgakhal@boolers.co.uk

Lucy Barwell

ACCOUNTANT
DD: 0116 240 7073
lbarwell@boolers.co.uk

Tom Haynes

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

Lucy Young

ACCOUNTS ADMINISTRATOR
DD: 0116 240 7261
lyoung@boolers.co.uk

BUSINESS SUPPORT

Caroline Athey

HR MANAGER
DD: 0116 240 7088
cathey@boolers.co.uk

Alison Bourne

HR ASSISTANT
DD: 0116 240 7064
abourne@boolers.co.uk

Louise Hazelman

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

Julie Herbert

OFFICE MANAGER'S ASSISTANT
DD: 0116 240 6978
jherbert@boolers.co.uk

Nicola Askins

SECRETARIAL SUPPORT
DD: 0116 240 7071
naskins@boolers.co.uk

Claire Potter

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