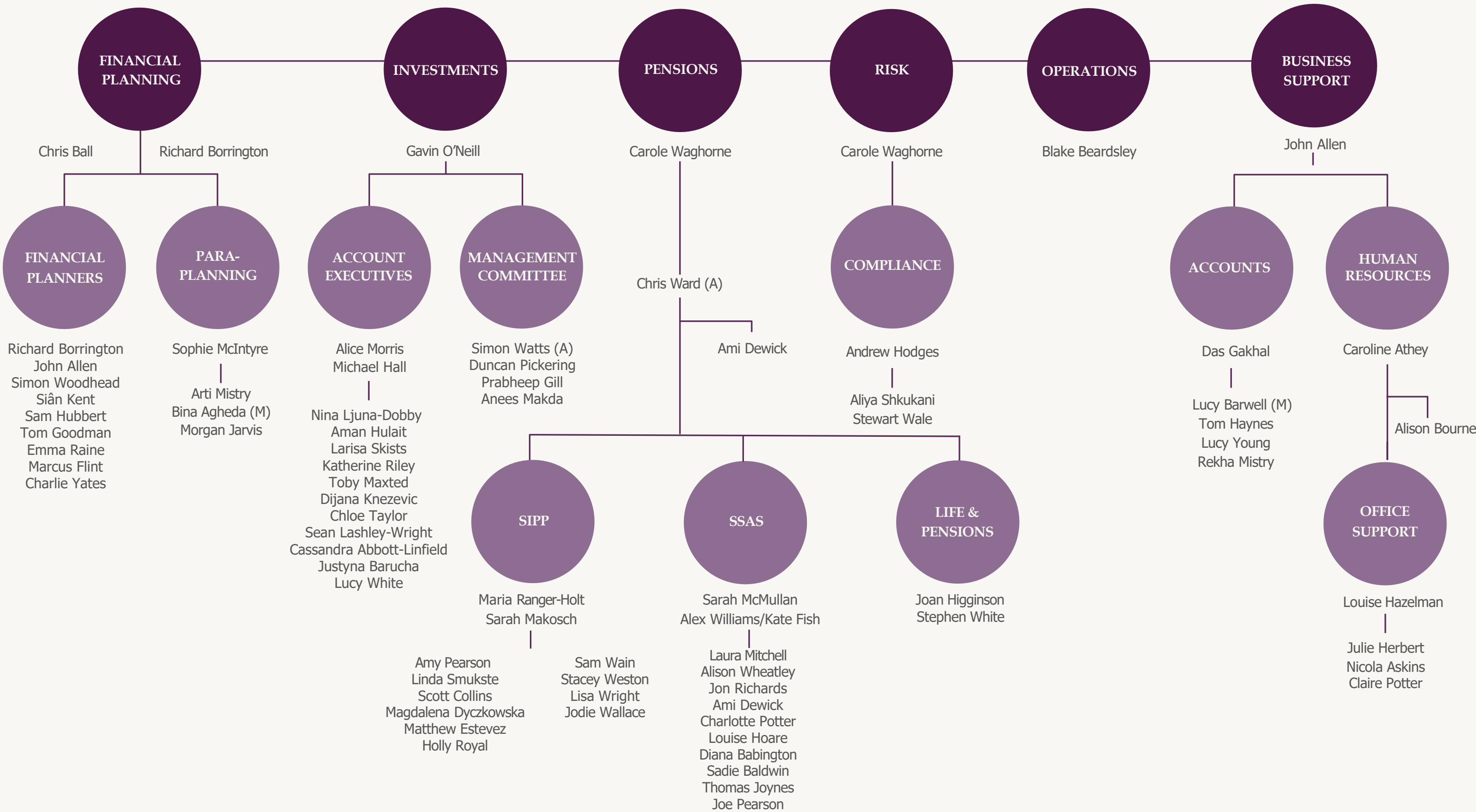


ORGANISATION STRUCTURE

BOOLERS



(A) Associate

(M) Maternity

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 Booter & 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 Waghorne
CHARTERED FINANCIAL PLANNER
Special Responsibilities:
HEAD OF PENSIONS & RISK
DD: 0116 240 7093
cwaghorne@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
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

Dijana Knezevic
INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 240 7063
dknezevic@boolers.co.uk

Chloe Taylor
INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 502 2341
ctaylor@boolers.co.uk

Sean Lashley-Wright
INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 240 6987
slashley-wright@boolers.co.uk

Cassandra Abbott-Linfield
INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 240 7067
cabbott-linfield@boolers.co.uk

Justyna Barucha
INVESTMENT ACCOUNTS EXECUTIVE
DD: 0116 502 2344
jbarucha@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
PARAPLANNER
DD: 0116 240 6984
amistry@boolers.co.uk

Bina Agheda (M)
PARAPLANNER
DD: 0116 240 6980
bagheda@boolers.co.uk

Morgan Jarvis
TRAINEE PARAPLANNER
DD: 0116 502 2346
mjarvis@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

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

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

Sam Hubbert
FINANCIAL PLANNER
DD: 0116 240 7080
M: 07884 836 816
shubbert@boolers.co.uk

Marcus Flint
ASSISTANT FINANCIAL PLANNER
DD: 0116 240 6989
mflint@boolers.co.uk

Charlie Yates
ASSISTANT FINANCIAL PLANNER
DD: 0116 502 2343
cyates@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
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

Joe Pearson
Administrator
DD: 0116 502 2342
jpearson@boolers.co.uk

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 Pearson
SIPP ACCOUNTS EXECUTIVE
DD: 0116 240 7097
apearson@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

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

COMPLIANCE

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

Aliya Shkukani
COMPLIANCE ASSISTANT
DD: 0116 240 7268
ashkukani@boolers.co.uk

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

ACCOUNTS

Das Gakhai
FINANCE DIRECTOR
DD: 0116 240 7262
dgakhai@boolers.co.uk

Lucy Barwell (M)
ACCOUNTANT
DD: 0116 240 7073
lbarwell@boolers.co.uk

Tom Haynes
MANAGEMENT ACCOUNTANT
DD: 0116 240 6972
thaynes@boolers.co.uk

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

Rekha Mistry
ACCOUNTS ASSISTANT
DD: 0116 240 7073
rmistry@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
RECEPTIONIST
DD: 0116 240 7071
naskins@boolers.co.uk

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

(A) Associate

(M) Maternity

Reception is open Monday to Thursday from 8am to 5pm and Friday from 8am to 4:30pm