ORGANISATION STRUCTURE

BOOLERS

FINANCIAL PLANNING

Chris Ball

FINANCIAL PLANNERS

Richard Borrington
John Allen
Simon Woodhead
Siân Kent
Sam Hubbert
Tom Goodman
Emma Raine
Marcus Flint
Charlie Yates

Richard Borrington

PARA -PLANNING

Sophie McIntyre

Arti Mistry
Bina Agheda (M)
Morgan Jarvis
James Ellis

OPERATIONS

Blake Beardsley

CLIENT MANAGEMENT

Alice Morris
Michael Hall

Joan Higginson
Nina Ljuna-Dobby
Stephen White
Aman Hulait
Larisa Skists
Katherine Riley
Toby Maxted
Dijana Knezevic
Sean Lashley-Wright
Cassandra Abbott-Linfield
Justyna Barucha
Lucy White
Chloe Taylor

INVESTMENTS

Gavin O'Neill

MANAGEMENT COMMITTEE

Simon Watts (A)
Duncan Pickering
Prabheep Gill
Anees Makda

PENSIONS

Carole Waghorne

Chris Ward (A)
Ami Dewick

SIPP

Maria Ranger-Holt
Sarah Makosch

Amy Wood
Linda Smukste
Scott Collins
Magdalena Dyczkowska
Matthew Estevez
Holly Royal
Sam Wain
Stacey Weston
Lisa Wright

SSAS

Sarah McMullan
Alex Williams & Kate Fish

Laura Mitchell
Alison Wheatley
Jon Richards
Ami Dewick
Charlotte Potter
Louise Hoare
Diana Babington
Sadie Baldwin
Thomas Joynes
Joe Pearson

RISK

Carole Waghorne

COMPLIANCE

Andrew Hodges

Aliya Shkukani
Stewart Wale

BUSINESS SUPPORT

John Allen

ACCOUNTS

Das Gakhal

Lucy Barwell (M)
Tom Haynes
Lucy Young
Rekha Mistry

HUMAN RESOURCES

Caroline Athey
Alison Bourne

OFFICE SUPPORT

Louise Hazelman

Julie Herbert
Nicola Askins
Claire Potter

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.

(A) Associate **(M)** Maternity

Financial Planners
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

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:
CLIENT MANAGEMENT, OPERATIONS, CYBER SECURITY & IT
DD: 0116 240 7079
M: 07754 298744
bbeardsley@boolers.co.uk

Marcus Flint
FINANCIAL PLANNER
DD: 0116 240 6989
M: 07350 412 168
mflint@boolers.co.uk

Charlie Yates
ASSISTANT FINANCIAL PLANNER
DD: 0116 502 2343
M: 07388 397 919
cyates@boolers.co.uk

PARAPLANNING

Sophie McIntyre
HEAD OF PARAPLANNING
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

James Ellis
TRAINEE PARAPLANNER
DD: 0116 502 2345
jellis@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

INVESTMENT MANAGEMENT COMMITTEE

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

CLIENT MANAGEMENT

Alice Morris
CLIENT MANAGEMENT TEAM LEADER
DD: 0116 240 7081
amorris@boolers.co.uk

Michael Hall
DEPUTY CLIENT MANAGEMENT TEAM LEADER
DD: 0116 240 7074
mhall@boolers.co.uk

Joan Higginson
CLIENT MANAGER
DD: 0116 240 7085
jhigginson@boolers.co.uk

Nina Ljuna-Dobby
CLIENT MANAGER
DD: 0116 240 7078
nljuna-dobby@boolers.co.uk

Stephen White
CLIENT MANAGER
DD: 0116 240 7086
swhite@boolers.co.uk

Aman Hulait
CLIENT MANAGER
DD: 0116 240 6971
ahulait@boolers.co.uk

Larisa Skists
CLIENT MANAGER
DD: 0116 240 6975
lskists@boolers.co.uk

Katherine Riley
CLIENT MANAGER
DD: 0116 240 7066
kriley@boolers.co.uk

Dijana Knezevic
CLIENT MANAGER
DD: 0116 240 7063
dknezevic@boolers.co.uk

Chloe Taylor
CLIENT MANAGER
DD: 0116 502 2341
ctaylor@boolers.co.uk

Sean Lashley-Wright
CLIENT MANAGER
DD: 0116 240 6987
slashley-wright@boolers.co.uk

Cassandra Abbott-Linfield
CLIENT MANAGER
DD: 0116 240 7067
cabbott-linfield@boolers.co.uk

Justyna Barucha
CLIENT MANAGER
DD: 0116 502 2344
jbarucha@boolers.co.uk

Toby Maxted
CLIENT MANAGER
DD: 0116 240 7083
tmaxted@boolers.co.uk

Lucy White
CLIENT MANAGEMENT ADMINISTRATOR
DD: 0116 240 7265
lwhite@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

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

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

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 Gakhal
FINANCE DIRECTOR
DD: 0116 240 7262
dgakhal@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

Financial Planners
Chartered

(A) Associate (M) Maternity

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