

YOUR WEALTH MANAGER'S PROFILE



Name: Simon Wood-Woolley
Role: Director
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Overview

Simon has more than 15 years of Financial Services experience, in roles ranging from retail banking to Directorship.

Simon has:

- Experience in core advice areas, as well as specialism in Wealth Management.
- Achieved Personal Finance Society Diploma Level (DipPFS).
- Is a member of the Personal Finance Society.
- BA (hons) Business & Finance.
- Has a network of specially selected experts to support your advice needs.
- Worked across all client areas and specialises with – private clients, corporate clients & SME.
- Built a solid network of high net worth private clients and Small & Medium Size enterprise businesses.

Specific Skills:

- Investment and pre-retirement planning
- Near and post retirement planning
- Inheritance taxation
- Personal taxation self-assessment

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