



Simon Wallis-Taylor MCSI
Financial Planning Technician

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- **Role:**

Simon is a Financial Planning Technician, supporting the Financial Planners by creating tailored wealth management solutions for our clients and handling client queries. Having worked in the industry for 20 years, his particular area of focus is cashflow and tax planning. Already qualified to Chartered Financial Planner level and a Fellow of the Personal Finance Society, Simon is also working towards achieving Certified Financial Planner status.

- **Qualifications:**

Diploma in Financial Planning.

- **Memberships:**

Chartered Institute for Securities and Investment (CISI).
Fellow of the Personal Finance Society (FPFS).
The Chartered Insurance Institute (CII).