

## Fiscal Engineers Directors



Shane Mullins MIFP  
Managing Director

### Specific roles:

- Head of Strategy and Development
- Design of Wealth Management solutions
- Member of Fiscal Engineers' Investment and Research Committee



Roger Summerton FCA  
Director

### Specific roles:

- Director of Finance & Administration
- Implementation of family office solutions
- Development of tax strategies



Ian Rodger CFP<sup>CM</sup>  
Associate Director

### Specific roles:

- Implementation of Wealth Management solutions
- Head of Pensions Strategy
- Chair of Fiscal Engineers' Investment and Research Committee



Gini Bolton CFP<sup>CM</sup>  
Associate Director

### Specific roles:

- Implementation of Wealth Management solutions
- Client events - Oversight and organisation

## Fiscal Engineers Team



### Specific roles:

- Responsible for Compliance
- Development and implementation of strategic plans
- Operations and HR Manager

Peter Burnham  
Operations & Compliance Manager



### Specific roles:

- Provides specialist technical support in the delivery of tailored wealth management and tax strategies to clients
- Oversight of all technical client communications

Nick Edwards FIFP, CFP<sup>CM</sup>, PFPS,  
Chartered Financial Planner Head of Technical



### Specific roles:

- Researching Investment Funds and Products
- Producing Cashflow and Asset Allocation Models
- Preparing Financial Plans and Reports

Dave Till  
Client Services - Technical



### Specific roles:

- Researching Investment Funds and Products
- Producing Cashflow and Asset Allocation Models
- Preparing Financial Plans and Reports

Elizabeth Bradshaw  
Client Services - Technical



### Specific roles:

- Researching Investment funds and products
- Producing cashflow and asset allocation models
- Preparing financial plans and reports

Ayaz Khan  
Client Services - Technical



### Specific roles:

- Implementation of client specific investment strategies
- Management of client data
- Handling client enquiries
- Liaison between clients and investment providers

Hazel Manlove  
Client Services - Administration



### Specific roles:

- PA to the Directors
- Client Events - organisation and assistance
- Company administration

Kim Mycock  
PA to the Directors



### Specific roles:

- Implementation of client specific investment strategies
- Management of client data
- Handling client enquiries
- Liaison between clients and investment providers

Helen Burnett  
Client Services - Administration



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- Implementation of client specific investment strategies
- Management of client data
- Handling client enquiries
- Liaison between clients and investment providers

Sharon Beevers  
Client Services - Administration