

Fiscal Engineers Directors

Shane Mullins MIFP
Managing Director



Specific roles:

- Head of Corporate Strategy and Development
- Designing Wealth Management solutions
- Chair of Fiscal Engineers' Investment and Research committee

Ian Rodger CFP
Senior Financial Planner



Specific roles:

- Implementation of Wealth Management solutions
- Head of Pensions Strategy
- Member of Fiscal Engineers' Investment and Research committee

Roger Summerton FCA
Director & Head of Family Office



Specific roles:

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

Gini Bolton CFP
Director



Specific roles:

- Implementation of Wealth Management solutions
- Assistance with HR & Operations Management
- Member of Fiscal Engineers' Investment and Research committee

Fiscal Engineers Team

Louise Barnes
PA to the Directors



Specific roles:

- PA to the Directors
- Client Events, Oversight and Organisation
- Company Administration

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

Helen Burnett
Client Services - Administration



Specific roles:

- Management of client data
- Liaison with Investment Houses and Companies
- Handling client enquiries
- Management of client transition onto custody platforms

Hazel Manlove
Client Services - Administration



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- Management of client data
- Liaison with Investment Houses and Companies
- Handling client enquiries
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Michelle Patrick
Client Services - Administration



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Sue Armitage
PA to the Directors



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- PA to the Directors
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