The company

We hold the Corporate Chartered accreditation from the Chartered Insurance Institute and the Accredited Firm status from the Chartered Institute for Securities and Investments.

Our team

Hamish and Debbie are Chartered Financial Planners and Certified Financial Planners ™ (CFP™).   The CFP™ is specifically for those providing holistic financial plans.   Following an initial financial plan they can provide advice on the following: tax, trusts, pensions (including pension transfers), insurance such as life assurance and critical illness, investments and long term care. David is a Chartered Wealth Manager.

Our financial planning assistants are working towards their Chartered Financial Planner qualifications. Our administrators are working towards their diplomas in regulated financial planning.

Hamish Leng

Chartered Financial Planner

Hamish started as a financial planner in 1980 and is now working with many of the grandchildren of his original clients.

He holds the Chartered and Certified Financial Planning (CFP™) accreditation, is an Associate of the Personal Finance Society (APFS) and a Chartered Wealth Manager.

He has qualifications in pensions, financial planning, tax and trusts, investments and long term care.

David Carroll

Chartered Wealth Manager

David joined us in January 2019.

He has advised private clients since 1987.

He helped found Seven Investment Management (7IM) in 2002.   He was the founding head of the firm's discretionary relationship management team and more recently Head of Strategy.

He is a Chartered Wealth Manager, Fellow of the Chartered Institute for Securities and Investments and is on track to becoming a Chartered Financial Planner.

Debbie Phillpotts

Chartered Financial Planner

Debbie has provided clients with financial advice since 1989. She joined us in April 2017 from C. Hoare & Co.

She holds both the Chartered and Certified Financial Planning (CFP™) accreditation, is a Fellow of the Personal Finance Society (FPFS) and a Chartered Wealth Manager.

She has qualifications in pensions, financial planning, tax and trusts, investments and long term care.

She graduated from York University with honours in English and Related Literature.

Natalie Burnand

Head of Investments

Natalie joined us in April 2015 to look after our clients' investments.

Prior to this she worked at Cazenove Capital Management as an analyst on the multi-manager team and before that in corporate finance with J P Morgan in New York.

After running a £2 billion international equity fund at SWIP she joined Aberdeen Asset Management as a fund manager on the multi-manager team.

She graduated with high honour from the University of Virginia with a BA in foreign policy.

Susie Gunn

Practice Manager

Susie has helped Hamish look after his clients since 1994 (she joined the firm straight after her 11+!).

Peter Gadsden

Assistant Planner

Peter joined us in September 2018 .

She oversees the operations side of the firm and keeps everything and everyone on the right track!

Carla Gardner
Assistant Planner

Carla joined us in September 2017.

She has worked in financial planning since 2011. She has a degree in financial services from Manchester Metropolitan University and the diploma in regulated financial planning. She is working towards becoming a Chartered Financial Planner.

Emily Meltham
Administrator

Emily joined us in September 2018 and has worked in financial services since

He has worked in financial planning since 2016. He has a 1st class degree in Archaeology and Ancient Civilisations from Durham University. He holds the diploma in regulated financial planning and is working towards becoming a Chartered Financial Planner.

Andrew Spencer-Knight
Assistant Planner

Andrew joined us in February 2018.

He has worked in the financial services industry since 2000. In his previous role, he was a pension specialist at a corporate benefits firm.

He holds the diploma in regulated financial planning and is currently working towards becoming a Chartered Financial Planner.

Karen Reid
Administrator

Karen joined us in February 2017.

2017. She is currently working towards the diploma in regulated financial planning.

She holds an MA in Medieval Studies and a BA in History and Music, both from Royal Holloway (University of London).

She has worked in financial planning since 1994 and is working towards the diploma in regulated financial planning.