

TEAM PROFILE

# Wealth Management

Meet some of our team who can provide you with a fully comprehensive wealth management solution.



**Roy Thompson**  
Partner,  
Head of Wealth Management  
E: [roy.thompson@carpenterbox.com](mailto:roy.thompson@carpenterbox.com)

Roy has nearly 20 years of experience working in the Financial Services sector and has a background of dealing with both corporate and private clients. He specialises in holistic financial planning including pensions, investments and protection for individuals and companies and advising businesses in respect of pension auto enrolment.



**Simon Fox**  
Consultant  
E: [simon.fox@carpenterbox.com](mailto:simon.fox@carpenterbox.com)

Simon has over 25 years' experience as an Independent Financial Advisor. Whilst Simon advises clients in respect of all areas of financial planning, his specialist areas are the provision of investment, retirement and tax planning advice to individuals wishing to mitigate income, capital gains and inheritance taxes and also a pension transfer specialist.



**Tom Reed**  
Senior Financial  
Planning Manager  
E: [tom.reed@carpenterbox.com](mailto:tom.reed@carpenterbox.com)

Tom has over 10 years' industry experience and his background includes handling clients across the globe as a specialist international advisor. His specialist areas include designing strategies to achieve financial targets and manage risks. He offers the full suite of financial planning services to individuals, families, businesses and trusts.



**Gill Lynes**  
Senior Financial  
Planning Manager  
E: [gill.lynes@carpenterbox.com](mailto:gill.lynes@carpenterbox.com)

Gill has over 20 years' experience working in the financial services sector and has a background in dealing with high net worth clients. Gill specialises in providing financial planning solutions to individuals in later life and is a member of the Society of Later Life Advisers (SOLLA).



**Kelvin Riches**  
Chartered Financial Planner  
E: [kelvin.riches@carpenterbox.com](mailto:kelvin.riches@carpenterbox.com)

Kelvin has over 10 years' experience in the Financial Services sector with a background in Retirement Income and Later Life planning. Kelvin specialises in helping people make their money work as hard as they do and plan for the big decisions in life.



**Ross Bauman**  
Paraplanning Team Leader  
E: [ross.bauman@carpenterbox.com](mailto:ross.bauman@carpenterbox.com)

Ross has over 6 years' experience in the financial sector. He works alongside financial advisers to create holistic financial plans for both individual and corporate clients across a range of areas including pensions and retirement, investments, protection and tax planning.



### Sue Sessions

Paraplanner

E: [sue.sessions@carpenterbox.com](mailto:sue.sessions@carpenterbox.com)

Sue has 30 years' experience of working in financial services. She joined MHA Carpenter Box Wealth Management in 2018 with a background of working within large accountancy practices. Sue's specialisms include pensions, investments and Inheritance Tax planning.



### Lucy Halliday

Paraplanner

E: [lucy.halliday@carpenterbox.com](mailto:lucy.halliday@carpenterbox.com)

Lucy has over 13 years' experience working in the financial services sector with a background in working with UK and overseas clients in a private and corporate capacity. She works closely alongside the advisers to help create individual financial plans. Lucy's specialisms include pensions, investments, Inheritance Tax planning and financial protection, both personal and business.



### Christian Phillips

Paraplanner

E: [christian.phillips@carpenterbox.com](mailto:christian.phillips@carpenterbox.com)

Christian has over 10 years' experience working in the financial services sector. His background includes providing holistic financial advice to high net worth professionals. Christian specialises in identifying and calculating best financial planning solutions to individuals, families and companies in all aspects of financial advice.



### Sally Whitehead

Paraplanner

E: [sally.whitehead@carpenterbox.com](mailto:sally.whitehead@carpenterbox.com)

Sally joined MHA Carpenter Box in 2018 after 16 years working for HMRC. She is combining studying for professional qualifications with gaining knowledge and understanding of the wider financial planning process in order to assist clients with achieving their financial goals.



### Emma Westwod

Operations Manager

E: [emma.westwood@carpenterbox.com](mailto:emma.westwood@carpenterbox.com)

Emma has over 25 years' experience in Operational Management and provides support and guidance to the team. Her focus is on implementing, maintaining and monitoring efficient and effective systems and processes in order for the team's outputs to be compliant, and to the highest possible standard.



### Shelley Bartup

Sales Support

E: [shelley.bartup@carpenterbox.com](mailto:shelley.bartup@carpenterbox.com)

Shelley provides support to the advisers and paraplanners to create a cohesive client experience and can assist with administrative queries. She focuses on ensuring client needs are met and new business is processed efficiently.



### Megan Addle

Sales Support

E: [megan.addle@carpenterbox.com](mailto:megan.addle@carpenterbox.com)

Megan provides administrative support to clients, paraplanners and the advisers. She focuses on ensuring team and client requests are addressed and processed effectively.