



Susan Lovell APFS
Chartered Financial Planner

- Over 23 years' experience in financial planning
- Associate member of the Personal Financial Society
- Holding advanced financial planning qualifications in the following specialist fields:
 - Personal taxation and trust planning
 - Pension planning including Pension Transfer Specialist qualification
 - Investment planning
 - Financial planning process
- Extensive experience working with high net worth and ultra high net worth families, companies, charities, trusts and pension schemes with investable assets exceeding £1M
- 15 years of my experience has been within professional practices, both accountancy and solicitors
- Experience working within divorce cases involving pension funds
- Focus group member of Business Womens Link



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