SIMON BRAY
WEALTH MANAGEMENT

MEET THE TEAM

As a Practice, we have over 75 years' experience in the ever changing financial services industry and draw on this considerable knowledge and expertise in advising clients in all aspects of financial planning whilst delivering a high level of personal service.

SIMON BRAY BA FPFS

Director and Chartered Financial Planner

Simon established Simon Bray Wealth Management Ltd in May 2012, after 13 years of being employed by large financial institutions with the desire to create an owner managed business that would deliver bespoke, clear and concise financial solutions to private individuals, families, businesses and trustees.

Simon is a Chartered Financial Planner, a Fellow of the Chartered Insurance Institute and an accredited Later Life Adviser by the Society of Later Life Advisers.

Simon's commitment to ongoing professional development provides Private and Business clients with the reassurance and confidence that they are receiving advice from one of the most qualified professional advisers in the country.

SOLLA Society of Later Life Advisers

Financial Planner Chartered

FLSP Financial & Legal Skills Partnership
FLSP Endorsed Later Life Adviser

MEET THE TEAM

JULIE HOPKINS Client Service Manager

Julie joined the Practice in July 2016 after 20 years working in the insurance industry, bringing valuable experience in managing a team focussed on delivering first class customer service. In describing her new role Julie says "I am committed to providing an excellent level of bespoke customer service to each of our clients, and believe every one of our clients deserves to receive the best experience possible when dealing with Simon Bray Wealth Management Ltd."

CELIA PALMER Client Service Assistant

Celia joined the Practice in February 2015 after 23 years working in the banking industry, bringing valuable experience in managing client relationships and delivering first class customer service. Celia works with Julie as the first point of contact for client enquiries and supports Simon with client communications.

SUSANNAH GAHAN Paraplanner

Susannah joined the team in May 2014 having had 25 years of experience in financial services, previously as an adviser at Natwest Private Banking. Susannah provides Simon with valuable technical support and assists with formulating solutions to complex areas of advice, such as inheritance tax planning and pension planning.

H2SJP32476 07/19