

Your local Independent Financial Adviser

Lloyd & Whyte

Simon Gardner APFS, Certs CII (MP & ER)
Somerset and Southern Counties



I am a qualified Financial Planner with 19 years experience in the profession.

For the past 11 years I have worked for Lloyd & Whyte, specialising in the provision of holistic planning to healthcare professionals, through our relationships with many of the UK's top professional associations, including the British Dental Association, British Veterinary Association and Association of Optometrists, to name but a few.

I believe that understanding people is the key to helping clients achieve success, whether in their career or personal lives. Having a plan and taking the time to monitor and review the plan helps to focus clients on what really matters to them.

I advise on the more complex aspects of personal financial planning, particularly 'pre' and 'post' retirement advice - working with clients to fulfil their aspirations.

As your Independent Financial Adviser I will create a financial plan to meet your personal goals totally unconstrained by any obligation other than to you.

You can contact me by:

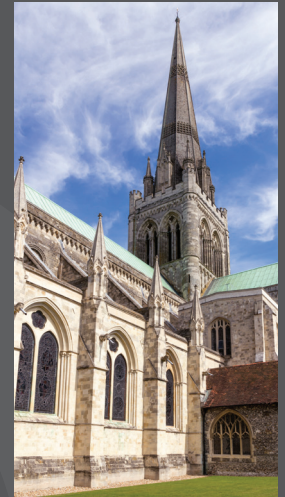
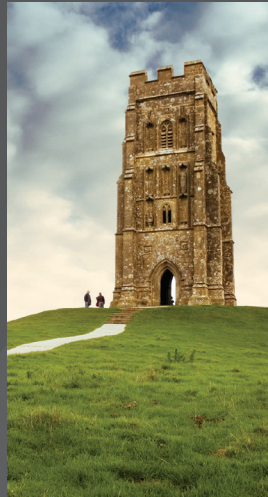
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Professional financial planning tailored to you



Financial Planning is an ongoing partnership that helps you to fully explore, identify and achieve your financial goals and lifestyle aspirations.

By building relationships we gain a clear appreciation of your life plan which enables us to best deliver an effective, all-encompassing planning service over the short, medium and longer term.

You might be a dentist, vet or optometrist. But we know you're also David, Andrew or Sarah. Unique people, with individual dreams and goals.

About Lloyd & Whyte

We have specialist experience with healthcare professionals, and being independent means our advice is completely impartial. This blend of experience and independence means we're uniquely placed to help our customers achieve and protect what matters to them.

Why choose us?

Healthcare professional specialist

Appointed by 6 national healthcare associations, including:

- Association of Optometrists
- British Chiropractic Association
- British Dental Association
- British Society of Dental Hygiene and Therapy
- British Veterinary Association
- Pharmacists' Defence Association

Understanding client aspirations and financial planning needs

Building long term client relationships

Client risk and investment management

Working with your Accountant and Solicitor

Corporate Chartered Financial Planner status

Established for nearly 70 years

What can financial planning do for me? >>

