

**SIMON GOULD BSc (Econ) Hons, APFS - Chartered Financial Planner, The STEP Certificate for Financial Services (Trusts and Estate Planning), Director of Gould Financial Planning Ltd**

Simon is a Chartered Financial Planner and whilst he remains authorised with the Financial Conduct Authority, he is also an affiliate of the Society of Trusts and Estate Practitioners (STEP).

Now in his 60's Simon is stepping back from front line advising. Whilst Simon is still available for client meetings, his challenge over the next year or so is to future proof the business and get Gould Financial Planning the British and International Standards accreditation.

**Professional Qualifications**

Joint Honours Degree in Economics and Accountancy (2:1) - 1972

Chartered Financial Planner - 2008

**Professional Background**

In 1973 Simon joined the Reserve Bank of Australia on a two year contract as an Economist in their Research Department in Sydney. Simon also taught economics part-time at Macquarie University, Sydney and became an Associate of the Australian Society of Accountants in 1975. From 1974 – 1990, Simon gained multi-disciplined experience working as Economist and Price Control Manager for Unilever, Australia (1974 – 1976), European Pricing Manager for Hertz Rent a Car (1976 – 1978), Director of Kewbury Management Services Limited (1978 -1982) and Managing Director of Clifton Group Limited (1980 – 1990).

In 1991 Simon joined Equitable Life Assurance Society as a representative in South Wales. From 1993 Simon was the Financial Planner for the South Wales branch with the specific responsibility to give strategic wealth and tax planning advice to the area's high net worth and corporate clients, widely regarded as one of the better and more experienced technical Financial Planners.

Simon then set up Gould Financial Planning in early 2001, and through organic growth the business now employs 16 staff and supervises some £150 million for clients.

**Outside Interests**

Simon's leisure time is spent travelling, playing bridge and competing on the golf course.