

## Biographical Notes

### Simon Holt, ACII

#### *PFS Director*

Simon Holt is 48 years old and has worked in both the Provider and Distributor markets. After starting his sales career with Clerical Medical, he joined Skipton Financial Services (SFS) as an IFA, ultimately rising through the ranks to take over as M.D. in 1995.

Under Simon's direction SFS grew to become one of the largest Advisory firms in the UK, employing well over 300 staff, with advisors across the country, focussing on Investment and IHT planning. He led the switch of most commission revenue being taken on reduced initial plus trail. Simon consciously drove the business to grow its client base beyond that of its parent, Skipton Building Society, firstly by acquiring the customer base of IFA Medical Insurance Agency in 2003. Subsequently he continued this strategy through a growing number of significant partnerships with affinities such as The Telegraph Group, The AA, Readers Digest, Thisismoney.com and MoneyExpert.com.

In July 2008, Simon left SFS to establish his own Financial Services consultancy business, including projects to date in the Wrap sector and Provider market.

Simon is married with two great children aged 16 and 13. His sporting passions include still playing cricket, he was a London Marathon finisher in 2004, and is a Manchester United fan.

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