

Expanding Colmore Partners invest in new director appointment

6th July 2022

We have strengthened our senior leadership team with the appointment of a new director.

Chartered Financial Planner, Simon Houlton, has joined the business as our new head of proposition, with responsibility for supporting our continued growth and development.



Simon has almost 25 years' experience in the financial services sector, most recently as chair of the advice committee at Punter Southall and head of its financial planning team in London.

He has a successful track record in advising high net worth individuals in the areas of financial and estate planning, pensions and investments, and has considerable experience in team management, regulatory supervision and the training and

development of financial planners.

Colmore Partners is an employee-owned consultancy that was founded in 2020 by Richard Meek and Wendy Fellows who, between them, have over 50 years' experience in the financial services industry.

Based at the Grade II* Imperial and Whitehall offices at The Grand Hotel Birmingham, we have more than £400 million of client assets under advice. We have grown from five members of staff to an experienced team of 13 employees, who are supported by an advisory board from different professional backgrounds.

Simon said: "This is a fantastic opportunity to support the leadership and future growth of a successful and dynamic business. Colmore Partners is led by highly skilled professionals who I have had the pleasure of working with in other roles. I'm confident we share the same values in delivering independent advice, where every decision is made in the best long-term interests of our clients.

"Alongside my client focused work, I will be responsible for several other areas of the business including internal processes, research and documentation, as well as ensuring that we are responsive to the latest industry changes and regulations. I'm also excited to lead the training and development of our new advisors and help shape the way we advise our portfolio of clients in the years ahead."

Richard Meek, Managing Director of Colmore Partners, said: "We're very pleased to have attracted someone of Simon's calibre and experience, whose ethos is aligned with our own. His skills in developing our proposition, as well as the advice and information we give to our clients will be invaluable. Much of Simon's career has been based in and around London, which also gives our business a greater geographical coverage. He is joining us at an ideal time in his career and is exactly the type of person to help us to continue our growth.

"Colmore Partners is a planning focused business that delivers holistic, independent advice. Our services are underpinned by market leading technology which makes us as efficient as possible and it's this combination which has enabled us to substantially grow the value of assets under our advice since we launched less than two years ago. We're always looking for high quality advisers with a good following, who want to be part of an exciting and growing firm."