Canada Life™

Canada Life™ International

Technical Services Team

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- Industry specialists experienced in the intermediary market
- Experts across trusts, taxation, pensions and other technical areas

Tax and Estate Planning

Paul Thompson

Paul has been employed in the financial services arena for over 40 years, specialising in taxation and trusts for the last 30 years. He is a Fellow of the Chartered Insurance Institute, sits on the ABI Product Tax Panel and is a long-standing member of the Insurance Institute of London.

Patrick Kennedy

With over 20 years experience, Patrick has worked in both financial adviser and provider marketplaces. Latterly he worked in a pensioneer trustee practice and as a technical officer for a Mutual Assurance Society focused on solving IHT case scenarios, particularly from a tax and trust prospective. He is a Chartered Financial Planner.

Cathy Russell

Cathy has worked in the financial services industry for over 20 years with experience in both financial adviser and provider marketplaces, specialising in taxation, trusts, estate planning and delivering training. She is a Fellow of the Personal Finance Society and a Chartered Financial Planner.

Canada Life Technical Support

Jeremy Pearson

Jeremy is a taxation, trust & estate planning specialist with over 30 years industry experience spent with various financial services companies. He is an affiliate of the Society of Trust and Estate Practitioners and can assist professional advisers with all aspects of wealth management.

Nigel Orange

Nigel is a pensions specialist with over 25 years in the industry spent with major life and pensions providers as a broker consultant and product and distribution specialist.

Neil Jones

Investment specialist with over 20 years financial services experience with life and pensions providers, an investment company and as an IFA specialising in pensions, investments and estate planning. Neil has been involved in product development, investment research and training.

Canada Life International Technical Support

Anthony Rothwell

Anthony first started work in the offshore life industry in 1982 for Lloyd's Life. He has nearly 20 years experience with Canada Life International, most of which have been in a technical capacity supporting sales, advisers and internal staff both pre and post-sale.

Hamish MacMurchie

Hamish has over 14 years experience in the offshore life industry mainly in the Technical Services department. He provides pre-sale and post-sale support to sales, advisers and internal staff.

Working with you to deliver accessible technical services

Call your local account manager first to find out more.

Technical Services: **01707 422999** | **ican@canadalife.co.uk** | **www.ican@canadalife.co.uk**

National sales teams

Delivering accessible Technical Services

- A dedicated national sales team allowing direct access to industry specialists with more than 200 years of experience in taxation, trusts, estate planning and pensions between them.
- Technical information delivered personally to you by experts, in the right way at the right time, for both onshore and offshore investment business.

Your Canada Life contacts

In the first instance, contact your local account manager for support on specific cases or general principles surrounding tax and estate planning for both onshore and offshore products, including trusts.

Regional Sales Managers

Jeff Lee	07771 374 229 – **North**
Nicola Weaver	07870 261 058 – **Midlands**
Alan MacKellar	07870 261 015 – **South**

Account Managers

North

Sarah Bucknall	07870 261 014
Alan Cameron	07870 261 044
Rob Dormon	07870 261 053
Jill Farebrother	07870 261 024
Lisa Medley	07870 261 034
Alan Montgomery	07870 261 018
James Stewart	07870 261 076
Colin Ware	07870 261 055

Midlands

Peter Baroth	07870 261 008
Kevin Barton	07870 261 010
Kevin Coburn	07870 261 052
Mark Hatton-Smith	07870 261 026
Ash Kapasi	07500 085 008
Sarah Wakefield	07870 261 072
Nick Wardrop	07870 261 042
Mark Watkins	07870 261 056

South

Stephen Barr	07870 261 009
Mark Jenner	07870 261 031
Nick Priest	07870 261 075
Richard Thomas	07870 261 051

Canada Life Limited, registered in England no. 973271. Registered office: Canada Life Place, Potters Bar, Hertfordshire EN6 5BA Telephone 0845 226232 Facsimile 01707 646088 www.canadalife.co.uk/ifa

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