

BURLINGTON

A S S O C I A T E S

Gary Lucas - Financial Planner / Independent Financial Adviser



Gary has been advising individuals and corporate entities since leaving University in 1994. He holds the Chartered Institute G60 Pension qualification and prides himself as specialising in Pension needs when his general Financial planning expertise is not required. Gary's individual clients are mainly Partners of the magic/silver circle of law firms and as such has gained a comprehensive understanding of the financial needs and desires of such individuals. Gary has existing clients at the following law firms; Denton Wilde Sapte, Hogan Lovells, Watson Farley Williams, Decherts, Clifford Chance, Paul Hastings, Addleshaw Goddards, Osborne Clark, Nabarro, Olswang, Farrers, DLA Piper, Wedlake Bell as well as others.

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Gary is an active contributor to a notable Citywire publication and is a member of the Chartered Institute of Insurance and has a BA Honours degree in Finance & Accounting. He offers advice on all areas of Financial Planning and also provides specialist pensions advice on the following: Drawing income at retirement (Income drawdown, flexible drawdown and annuity purchase), Self Invested Personal Pensions investing in complex property purchases and share transactions, Family Pension Trusts, Transfers from Occupational pensions, legislative issues and pensions investment structures.

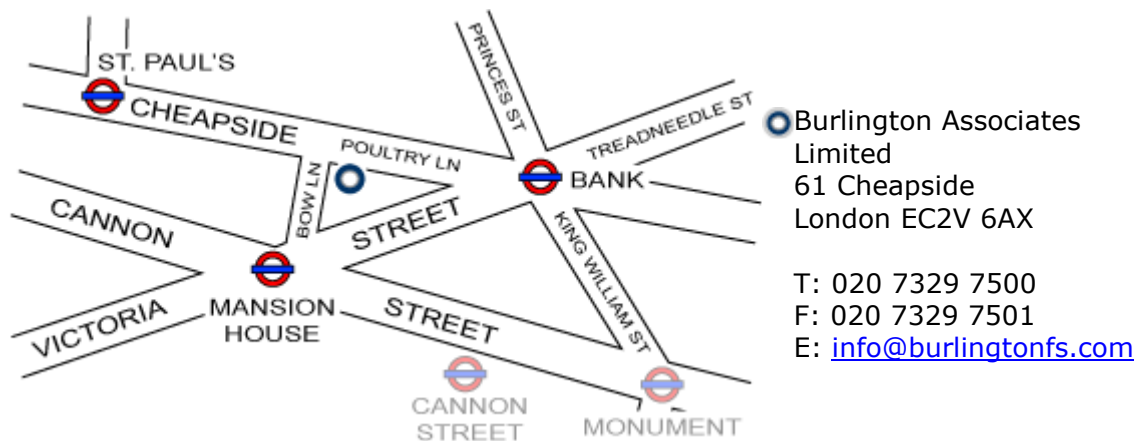
At a corporate level he has considerable experience in the following areas: Designing and implementing Employee Benefit Packages (E.B.P), tax efficient remuneration structures, Key Person planning and Corporate Will planning.

Gary is a keen outdoor sports fan and his interests include golf, squash, sea and course fishing, distance running, mountain biking and scuba diving. He lives near Hampton Court with wife Emma.

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MAP & DIRECTIONS TO OUR CHEAPSIDE OFFICE



Directions

From Bank Station: Take exit 9 and the up escalator by the Boots Opticians. Take the right hand exit at the top of the escalator then turn left onto the pavement towards St Pauls along Cheapside. Number 61 is about 300 yards along the road on your left, after one road crossing. We are in between Daunt Books and an Orange Mobile phone store. Our office is on the first floor.

From St Pauls Station: At street level, Cheapside is the main road heading east and now has the 'New Change' shopping centre off it. Number 61 is approximately 500 yards away on your right, (near the prominent Church Clock) and just after the bow lane intersection. Our office is on the first floor.

From Mansion House Station: Take exit number 4 which will bring you out into Bow Lane, turn left along this pedestrianised route until you reach Cheapside (approximately 150 yards). Turn right along the pavement at Cheapside and number 61 is just a few yards along from Bow Lane, adjacent to Daunt Books and an Orange mobile phone store. Our office is on the first floor.

If you are in any need of assistance please do not hesitate to call us on 020 7329 7500