



WEALTH PARTNERS

## MEET YOUR TEAM

Working closely with you to **'Make it Happen'**  
with the support and guarantees of a **FTSE 100 Company**

### YOUR PLANNERS

#### Dan Gallen

##### Managing Director & Wealth Planner

07540 34 81 08 (Jules) [dan.gallen@sjpp.co.uk](mailto:dan.gallen@sjpp.co.uk)

Dan founded 3D Wealth in 2010, following 7 years prior industry experience. He runs it, and looks after Clients, with lots of **personality, passion and pride**. Dan values and rewards openness, trust and loyalty.

#### Mabs Ahmed

##### Wealth Planner

07852 92 80 08 [mabs.ahmed@sjpp.co.uk](mailto:mabs.ahmed@sjpp.co.uk)

Dan and Mabs are your Wealth Planners and will get to know you, your Family and, if applicable your Business, to be able to provide truly bespoke and beneficial Personal and Business financial advice, ideally in line with a Plan, to help you achieve goals and/or avoid potential issues. They will help you **DEFINE** what Wealth means for you personally then, along with the 3D Team, they'll **DESIGN** a plan to help **'Make It Happen'** so that together we can **DELIVER** it for you and those that matter to you. Estate, Investment, Retirement, Trusts, Protection, Personal Tax Reduction and all aspects of Business Financial and Tax Planning are their core strengths.

#### Jordan Lamin

##### Mortgage Planner

07472 13 26 99 [jordan.lamin@sjpp.co.uk](mailto:jordan.lamin@sjpp.co.uk)

Jordan runs your Mortgage Desk, sourcing the best deals independently and with access to exclusive deals negotiated by St. James's Place, completing all Administration and Processing to either improve your current Mortgage, help you buy a new property or simply plan a future purchase so it can be saved and budgeted for. **Jordan will be in contact with you** to obtain Mortgage related information and/or to provide updates on your enquiry and/or application. **Jordan is the best person to contact with any new or current mortgage enquiry and/or Personal referral.**

### YOUR SUPPORT

#### Jules Lamin

##### Operations

01908 26 44 30

07540 34 81 08 [jules.lamin@sjpp.co.uk](mailto:jules.lamin@sjpp.co.uk)

**Jules will be in contact with you** to book a meeting on behalf of your Wealth Planner and will ensure any queries or concerns are addressed efficiently and entirely. **Jules is the best person to contact when you refer a friend, family member or colleague** to us so they can enjoy, and benefit from, the same 3D experience as you and will ensure a confidential initial meeting happens quickly and conveniently.

#### Lindsay Nortje (pronounced 'Nokia')

##### Client Experience

01908 26 44 30

[lindsay.nortje@sjpp.co.uk](mailto:lindsay.nortje@sjpp.co.uk)  
**Lindsay will be in contact with you** to assist with completion of forms and payments and is the go-to person to raise questions on your behalf with St James's Place or your Wealth Planner. Lindsay carefully manages our Administration, processing all of your paperwork accurately, comfortably and efficiently to ensure you are delighted enough with your 3D experience to introduce family, friends and colleagues. **Lindsay is the best person to contact for progress updates on your Estate, Investment and Retirement research, services and/or applications.**

#### Lucy Creamer

##### Protection

01908 26 44 30

[lucy.creamer@sjpp.co.uk](mailto:lucy.creamer@sjpp.co.uk)  
**Lucy will be in contact with you** to assist with completion of medical questionnaires and research for Financial Protection and to progress applications to completion. Lucy supports Lindsay processing other administration, liaising with Providers and St. James's Place on your behalf. **Lucy is the best person to contact with all your Protection enquiries.**