

The Mentors

Yvonne Goodwin

Wife, mother of two and managing director of Yvonne Goodwin Wealth Management (YGWM), a small and highly successful Financial Planning business in Leeds, West Yorkshire.



After becoming IFA Woman of the Year, then FT Individual Pensions Adviser of the Year and Overall IFA of the Year, she realised she could not achieve her true potential with her employer and so took the life changing decision to do it "her way". YGWM launched in October 2007 providing her clients with a fee based financial planning and wealth management service, centred on lifetime cash-flow planning.

Yvonne is a regular 'blogger' for Citywire, a 'Best Advice' columnist for Money Marketing and a prominent social networker. She is a passionate volunteer with PFEG (Personal Finance Education Group) giving financial education in schools and is a regional committee member of the PFS. She is also doing the IFP Certification this year.

Prestwood User since: January 2007

Richard Hudson

Richard has over 20 years experience in the Financial Services Industry and is the Senior Partner of Hudsons, based in Devon.



Richard is married to Kathy (his Business Partner) and they have two children, Charlotte and Joshua. Prior to financial planning, Richard travelled extensively as a Yacht delivery skipper, and raced Yachts Professionally all over the World. As a 20 year old, he sailed the Atlantic while delivering a 1989 Canadian Admirals cup Yacht to the USA.

Richard was a keen Triathlete in the sports formative years and was part of a 4 man team that took part in the 1984 London to Paris Triathlon. They ran from London to Dover, swam the Channel and then cycled to Paris. It was a team event however they were the only entrants from 9 teams that undertook the swim without wet suits. Richard is still a keen Swimmer but the distances are a little less these days !!

For many years RJH has been a speaker at Financial Services meetings throughout the United Kingdom.

Prestwood User since: January 2002

Adrian Johnston

Adrian is Managing Director and the founder of Johnston Financial based in Edinburgh. His career started in 1971 with Friends Provident Life Office where he spent ten years, in six of which he specialised in handling pension schemes. In 1981 he joined Noble Lowndes Personal Financial Services Ltd as a Financial Services Consultant. In 1987 Adrian left to start Johnston Financial.



As well as being in the first group ever to be awarded the Chartered Financial Planner qualification, Adrian is the holder of the Personal Finance Society's pensions qualification and is registered with the FSA as a pension transfer specialist. Adrian has also been awarded the Certified Financial Planner (CFP) qualification.

From 1999 to 2001, Adrian was a member of the Personal Investment Authority (PIA) Small Business Practitioner Panel, and from 1990 to 1997 he was Area Chairman for the IFA Association in East Central Scotland.

Prestwood User since: June 2007

Marlene Shalton MSC(Econ)

Marlene is a Certified Financial Planner (CFP), Fellow of the Institute of Financial Planning (FIFP) and Chartered Financial Planner. She established her Financial Planning practice in 1991, aiming to provide a personal but professional Financial Planning Service and in 2007 sold the business to Bluefin. She continues as a Financial Planner and Wealth Manager with Bluefin and is involved in training, mentoring and transitioning the advisers to Planners within the company.



Marlene started her career as a Probation Officer and for 13 years gained experience in personal and coaching skills.

She is currently the Vice President of the IFP. Marlene is passionate about Financial Planning and voices this regularly to the media. Recently she was awarded Best Financial Planner in the New Breed Adviser awards 2009 (supported by High Net Worth magazine) and in December 2008, Retirement Planner of the Year. In January 2009, with colleague Julie Lord, she also won the New Model Adviser award for Wales.

Prestwood User since: October 1993

Phil Stafford

Phil is a Certified Financial Planner (CFP) and a partner in Hertfordshire based Stafford & Co which she founded with her husband Mike in 1986. Prior to that she accumulated 10 years experience in banking.

Phil has served on the board of the Financial Services National Training Organisation and the Financial Services Skills Council. She was a member of the Qualifications and Curriculum Authority's Financial Services Training and Advisory Group, the FSSC's Standards and Accreditation Committee and the Small Business Practitioner Panel of the Personal Investment Authority.



She was President of Hertfordshire based Business Women's Network and has acted as a Mentor to Hertfordshire University Women's Entrepreneurs Postgraduate course.

Taking on Prestwood Software almost 20 years ago gave Phil the foundation to establish a solid fee based practice of loyal clients. She is delighted to have the opportunity to pass on the benefit of this experience to other planners.

Prestwood User since: November 1990

Rebecca Taylor

Becky is Director of Dunham Financial Services based in Peterborough and London. She specialises in comprehensive financial plans for both Corporate and Individual Clients. Becky's role is to establish a clients aims for the present and the future, by discussing lifestyle and aspirations and helping to create a 'plan' to help them achieve these aims.



Becky is also the Chairperson of the East Midlands branch of the Institute of Financial Planning.

This is a role that she sees as being very important to promote the benefits of lifetime cash flow planning, and the role of the Certified Financial Planner license as a benchmark for quality Financial Planning and advice. She is a Fellow of the Institute of Financial Planning, a standard achieved by very few within the industry, with less than 80 people in the UK attaining this level.

Becky sits on the board of Directors of the Institute of Financial Planning with responsibility for Membership and Branches. Becky is also a Chartered Financial Planner and an Associate of the Personal Finance Society (APFS). In 2007, she was New Model Adviser of the Year, and in 2008 was awarded IFP Branch Chairman of the Year and Scottish Widows IFA Newcomer.

Prestwood User since: November 2005

Graham Ponting

Graham Ponting has over 25 years experience in financial services, having worked for two major specialist life offices; been life and pensions manager for a prestigious firm of chartered accountants; and a director of a London firm of financial advisers. Graham has run his own successful practice since October 1991.



The underlying theme to Graham's approach to wealth management is to help clients decide how they want to spend the rest of their lives, to agree planning assumptions related to the likely cost of that lifestyle and then help them prepare a plan, which when implemented, will make the best use of their resources towards the achievement of their objective. Typically this involves helping them with investment planning, tax minimisation and risk management.

Graham also:

- Is one of a very few Chartered Financial Planners in the UK
- Has achieved Certified Financial Planner (CFP) status, as accredited by the Institute of Financial Planning (IFP)
- Is an assessor for the above internationally recognised licence standard for the IFP
- Is an Associate of the Personal Finance Society (PFS)
- Holds the Financial Planning Certificate and Advanced Financial Planning Certificate of the Chartered Insurance Institute
- Holds the specialist pensions qualifications G60, K10, K20, CF9, investment qualifications G20, SV1, taxation and trusts qualification G10 and also Holistic Financial Planning H25

Prestwood User since: July 2001