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Background & Experience

Simon J. Owen, CFP®, CLU®, ChFC®, serves as Senior Vice President for Lion Street in Southern California. Simon draws upon his accounting and wealth planning knowledge to design and implement sophisticated insurance strategies to meet the tailored needs of high-net-worth families, executives, and business owners.

Simon has been in the financial services industry for more than 20 years. Prior to joining Lion Street, Simon was a Vice President for Highland Capital Brokerage based in the Los Angeles office. Prior to that, he was with Bank of America Merrill Lynch for 10 years, initially as a Financial Advisor within the Private Banking and Investment Group before becoming the Insurance Specialist responsible for subject matter expertise and point-of-sale support of life insurance, long-term care and disability income products for Financial Advisors and their clients in Southern California.

In addition to his Certified Financial Planner® (CFP®), Certified Life Underwriter® (CLU®), and Chartered Financial Consultant® (ChFC®) designations, he is a Chartered Accountant, Fellow of the Institute of Chartered Accountants in England and Wales, and holds the FINRA Series 7, Series 65, and Series 66 licenses.