



LION STREET

PRIVATE CLIENT GROUP



Simon J. Owen, CFP® , CLU® , ChFC®

SENIOR VICE PRESIDENT

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Simon J. Owen, CFP®, CLU®, ChFC®, serves as Senior Vice President for Lion Street Private Client Group 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.

PROFESSIONAL HIGHLIGHTS

Simon has been in the financial services industry for more than 20 years. Prior to joining Lion Street Private Client Group, 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.

DESIGNATIONS | LICENSES

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.



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Securities offered through Lion Street Financial, LLC., Member FINRA & SIPC. Investment Advisory Services offered through Lion Street Advisors, LLC., a Registered Investment Advisor.

Lion Street Private Client Group is comprised of an elite national network of planning specialists in the major U.S. wealth markets. We partner with financial advisors and professionals to provide sophisticated planning solutions, business and estate planning strategies, charitable planning, and specialized expertise focused on helping high-net-worth and business clients succeed.

Neither Lion Street, Inc., nor any of its affiliates provide legal or tax advice. For complete details, consult with your tax advisor and attorney.