IM Asset Management

Personal Injury Financial Planning

Meet the Team

Richard Potts, Chief Executive

Richard Potts is directly responsible for the formulation of investment strategy and the day-to-day investment management for all our clients, using IM Asset Management's in-house investment process.

Richard has over 25 years' experience managing equities and asset allocation in a number of high profile roles in the City, with firms such as Cazenove Fund Management, Eagle Star Investment Management and Baring Investment Management. He is a highly regarded investment manager with a track record of managing billions of pounds.

Richard established IM Asset Management, a subsidiary of Irwin Mitchell LLP in 2005. Previously to this Richard was in charge of UK and International Private Unit Trusts at HSBC Global Asset Management and was the head of Global Equities at Phillips & Drew Fund Management (PDFM).

Philip Ostle, Head of Financial Planning

Philip Ostle joined IM Asset Management in 2005. He has extensive experience in pre- and post-settlement personal injury work and oversees the financial planning team.

Philip graduated from Kings College, London, with a degree in Law and later moved into financial services working for a major Lloyds broker, specialising in estate planning and investment management. He then joined the financial services arm of one of the UK's largest stock broking institutions, with particular emphasis on all forms of investment tax planning. This was later to become part of Barclays Wealth Managers.

Prior to his role at IM Asset Management he worked for a large accountancy practice where, for 15 years, he provided investment and pensions advice to high net worth individuals, corporations and trusts.

Edward Tomlinson, Financial Planner

Edward Tomlinson joined IM Asset Management in 2005. He has a BSc in Mathematics from the University of Sheffield, has completed the Diploma in Financial Planning from the Chartered Insurance Institute and is working towards the Advanced Diploma. Edward is responsible for formulating client-specific financial strategies.

Edward previously worked for a substantial firm of Independent Financial Planners providing specialist investment and trust advice to high net worth clients and trustees. He has extensive knowledge and experience of financial services, especially advising trustees on suitable investment strategies.

Michael Egan, Financial Planner

Michael Egan specialises in personal injury, investment planning and tax advice. Michael began his career in financial services after graduating from Nottingham University in 1991. Working initially with Standard Life Assurance Company, he later moved to HSBC Trust Company where he specialised in tax planning and investment management advice to high net worth individuals and trusts. Michael joined IM Asset Management in 2008 from Royal Bank of Scotland Private Banking, where he concentrated on bespoke investments and tax planning.

Haidee Landa, Financial Planner

Haidee Landa joined IM Asset Management in 2010. Haidee has had many years' experience in the financial services industry most recently as an investment specialist for Legal and General.

Prior to that, Haidee was employed as an account manager for Aegon and Standard Life specialising in life and pensions advice. She has completed the Diploma in Financial Planning from the Chartered Institute of Insurers and the Investment Management Certificate from the CFA Institute.

Chris O'Meara, Financial Planner

Chris has over 20 years experience in the Financial Services Industry. Chris began his career at Halifax as an Independent Financial Adviser and later moved to Thompson's Financial planning, as adviser to clients of Solicitors and Accountants. Most recently Chris worked for Royal Bank of Scotland/NatWest providing innovative and tax efficient high net worth investment strategies.

Our Client Services team

We have a dedicated Client Services team that serves our clients nationwide. Our advisers cover all areas of the UK.

How to contact us

For further information, please contact our Client Services team on:

Telephone: 0870 1500 900
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imassetmanagement.com

"IM Asset Management always respond promptly and frequently go the extra mile to ensure that I and the client have the information required. They provide added value".
Ruth Wright, Partner, Court of Protection, Irwin Mitchell

"IM Asset Management always provide an excellent service".
Colin Ettinger, Partner, Irwin Mitchell

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