



# Simon J. Owen, CFP<sup>®</sup>, CLU<sup>®</sup>, ChFC<sup>®</sup>

SENIOR VICE PRESIDENT  
Lion Street—Southern California



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Simon J. Owen, CFP<sup>®</sup>, CLU<sup>®</sup>, ChFC<sup>®</sup>, 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<sup>®</sup> (CFP<sup>®</sup>), Certified Life Underwriter<sup>®</sup> (CLU<sup>®</sup>), and Chartered Financial Consultant<sup>®</sup> (ChFC<sup>®</sup>) 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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## ABOUT LION STREET

Lion Street is a privately held, top national distributor of life insurance to high-net-worth clients and businesses. We serve financial institutions through a growing network of elite point of sale professionals located in the major wealth markets. Based in Austin, Texas, Lion Street has over 75 employees providing brokerage support in new business, underwriting, case design, sales support, technology, and compliance to best align with the financial institutions we partner with. Lion Street's premier team partners with financial advisors and insurance professionals to provide intellectual capital, specialized resources, advanced marketing, specialty markets expertise, and business and estate planning strategies.



**LION STREET<sup>®</sup>**

Securities offered through Lion Street Financial, LLC.,  
Member FINRA & SIPC