BOOLERS INVESTMENT SEMINAR

2024 & BEYOND

Where: **Hilton Hotel East Midlands – The Dales Suite**
When: **Thursday 8th February 2024**

10:00:	Registration for 10:30 start
10:30:	Victoria Stevens, Liontrust *"Economic Advantage: UK Smaller Companies"*
11:00 – 11.30:	Simon Watts, Boolers *"Review, Reaction & Recovery"*
11:30 – 11:45:	Teas and coffees
11:45 – 12:00:	Gavin O'Neill, Boolers *"Performance, positioning and potential"*
12:00 – 12:30:	Q&A with Investment panel
12:30:	Lunch
14:00:	Event close

ABOUT THE EXPERTS

VICTORIA STEVENS, LIONTRUST

Victoria Stevens joined the Economic Advantage team in June 2015 to help research and analyse investment opportunities primarily across the small cap universe. She previously worked for almost five years at the growth company specialist broking and advisory firm finnCap Ltd, latterly as deputy head of corporate broking. Prior to joining finnCap, Victoria was a senior reporter and diary editor at the financial newspaper City AM, having studied Modern Languages at Oxford University.

ANTHONY CROSS, LIONTRUST

Anthony Cross joined Liontrust in 1997 and launched the Liontrust UK Smaller Companies Fund in 1998. He has also managed the Special Situations and UK Micro Cap funds since launch. Before moving to Liontrust, Anthony joined Schroder Investment Management as a graduate trainee, later becoming an equity analyst before joining the Smaller Companies team in 1994. Anthony Cross graduated in 1990 from Exeter University with a degree in Politics.

GAVIN O'NEILL, BOOLERS

Having joined Boolers in 2004, Gavin became a Partner in 2013 and has worked in Financial Services for nearly 30 years. Throughout this time Gavin has focused on investment advice and management, having attained the CISI Chartered Wealth Manager and CII Chartered Financial Planner status. Gavin heads the Investment Department and chairs our Investment Committee, with responsibility for the company's investment process and management.

SIMON WATTS, BOOLERS

Simon entered into the Financial Services industry in 1990 after a stint in the Civil Service, building experience with Norwich Union/Aviva, Zurich and AIG. He joined Boolers in mid-2013 and his role is as one of the Investment Managers, working with client portfolio construction and analysis. Simon is a Fellow of the Personal Finance Society, a Chartered Financial Planner and holds the CII's Level 4 Certificate in Discretionary Management and in November 2020 became an Associate of the business.