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# BOOLERS

## ANNUAL CLIENT CONFERENCE



Post budget planning opportunities and an introduction to our new range of funds

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**When:** Thursday 30th January 2025  
**Where:** Pride Park Stadium, Derby DE24 8XL

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**10:00:** Registration for 10:30 start  
**10:30 – 11:45:** **Session 1: Budget Presentation and Q&A with our expert panel**  
**11:45 – 12:00:** Teas and coffees  
**12:00 – 13:00:** **Session 2: Chris Ball & Gavin O’Neill, Boolers “An introduction to our new funds”**  
**13:00 – 14:00:** Lunch  
**14:00:** Event close

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### SESSION 1: BUDGET PRESENTATION AND Q&A WITH OUR PANEL

Join Chris Ball as he heads a lively debate with our expert panel on the recent budget and how this may impact you.



**CAROLE WAGHORNE**

Partner & Chartered  
Financial Planner



**CRAIG SIMPSON**

Tax Specialist



**STEPHEN HOWE**

Private Client Wills  
& Probate Expert

### SESSION 2: BOOLERS INVESTMENT COMMITTEE “AN INTRODUCTION TO OUR NEW FUNDS”

Boolers are proud to present our new fund offering. Chris Ball and Gavin O’Neill will be taking us through the key changes and how these may interact with the recent budget.



**GAVIN O’NEILL**

Business Owner & Chartered  
Financial Planner



**CHRIS BALL**

Business Owner & Chartered  
Financial Planner