

# BOOLERS

## ANNUAL CLIENT CONFERENCE

Post budget planning opportunities



**When:** Thursday 5th February 2026  
**Where:** Pride Park Stadium, Derby DE24 8XL

**10:00:** Registration for 10:30 start  
**10:30 – 10:35:** Housekeeping  
**10:35 – 11.45:** **Session 1: Budget Presentation and Q&A with our expert panel**  
**11:45 – 12:15:** Teas and coffees  
**12:15 – 13:00:** **Session 2: Gavin O'Neill, Simon Watts, Boolers "Investment Markets Key Themes"**  
**13:00 – 14:00:** Lunch & Networking  
**14:00:** Event close

### 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**  
Business Owner & Chartered  
Financial Planner



**CRAIG SIMPSON**  
Tax Specialist



**CHRIS BALL**  
Business Owner & Chartered  
Financial Planner



**SIMON WATTS**  
Associate & Senior  
Investment Manager

### SESSION 2: "INVESTMENT MARKETS, KEY THEMES"

Simon Watts will be contemplating key themes from an investment perspective, looking at both the political and economic influences that have impacted client portfolios and how Boolers are reacting to ever-changing markets.



**GAVIN O'NEILL**  
Business Owner & Chartered  
Financial Planner



**SIMON WATTS**  
Associate & Senior  
Investment Manager