

BoulterBowen WealthCare

Family Wealth Management In 2010

Seminar Response Form

“If you only attend one seminar on Family Wealth Management in 2010, this is it!”

Who are BoulterBowen WealthCare?



Simon Boulter

BoulterBowen WealthCare was created by Simon Boulter and Mo Bowen. Simon's background is tax and accountancy, working as a tax inspector before qualifying as a Chartered Accountant. Mo's background is in commerce, originally training and working as a buyer at Harrods before moving back to Devon to run her own businesses.



Mo Bowen

Simon and Mo have worked together for 10 years, combining their knowledge, skills and experience, helping to bring financial clarity and confidence and eliminating confusion and concerns about money.

The business traded for many years under the name of The Exeter Practice, but recently the name was changed to BoulterBowen WealthCare, to better reflect who we are, what we do and what we stand for.

Wishing You a
Happy and Prosperous New Year

BoulterBowen WealthCare

My interest is in the future because I am going to spend the rest of my life there.



BoulterBowen
WealthCare



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BoulterBowen WealthCare is the trading name of The Exeter Practice Limited, Registered in England: 5662391, Registered office: No1 Charlotte Mews, Pavilion Place, Exeter, Devon EX2 4HA
The Exeter Practice Limited is authorised and regulated by the Financial Services Authority

Wealth is the ability to
fully experience life.

Your New Year Seminar Invitation

Investment and Inheritance Tax Planning in Troubled Times

So far the 21st Century has been a troubled time for investors. Financial markets are in turmoil, interest rates are at an all time low and taxes are on the increase. Nobody knows what will happen next.

Many people who have built wealth feel their wealth threatened as never before. They feel confused by information overload from newspapers and television, are worried about making mistakes with their life savings, but don't know who to trust.

To help you feel confident about your wealth in 2010 we are pleased to invite you to a seminar with a refreshingly different approach to Family Wealth Management.

If you only attend one seminar on Family Wealth Management in 2010, this is it!

The Seminar Agenda

At the seminar we will show you how to:

- Stop feeling worried about money and start feeling confident.
- Build a robust investment portfolio that will stand the test of time.
- Leave a lasting legacy for your family, not the taxman!

Timetable:

10.30 - 11.00
Coffee and Registration

11.00 - 12.30
Briefing, with break

12.30 - 2.00
Luncheon and Questions

Seminar Dates and Venues

You can select from five dates and specially chosen venues:

Thursday 18th February

Gidleigh Park Hotel, Chagford



Wednesday 24th February

Mount Somerset Hotel, Nr. Taunton



Thursday 4th March

Combe House, Gittisham, Honiton



Tuesday 9th March

Lewtrenchard Manor, Nr. Okehampton



Tuesday 23rd March

The Palace Hotel, Torquay



What Next?

Experience tells us that the seminars will be very popular, so please reply promptly to secure your place. You can let us know that you will be attending by:

- Completing and returning the response form in the prepaid envelope
- Calling us directly on 01392 432211
- Applying online at our website www.boulterbowen.co.uk/seminars

Making a Difference

The seminars are complimentary, all we ask of our guests is a small donation to the local charities we support.



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To attend a seminar, please complete and return this card to us today in the envelope provided.

Name:

Address:

Postcode:

Home:

Mobile:

@ Email:

Seminar Dates and Venues: Number of places

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Please send me the BoulterBowen WealthCare Newsletter.
By post By email

I will be unable to attend but:

- Please contact me
- I would like details of future events
- Please do not contact me again

On receipt of your response we will contact you to confirm your place, or if that event is already fully booked, notify you of the alternatives.

Detach here