

# Investing in Turbulent Times...

A three-masted sailing ship is shown navigating through a dark, stormy sea. The sky is a deep purple and black, with several bright white lightning bolts striking down. The ship's sails are not fully deployed, and a skull and crossbones flag is visible on the rear mast. The overall atmosphere is one of danger and uncertainty.

Graham Rowan, Chairman

*Beaufort*®  
Private Equity

# An Historic Inflection Point?



1971



2022



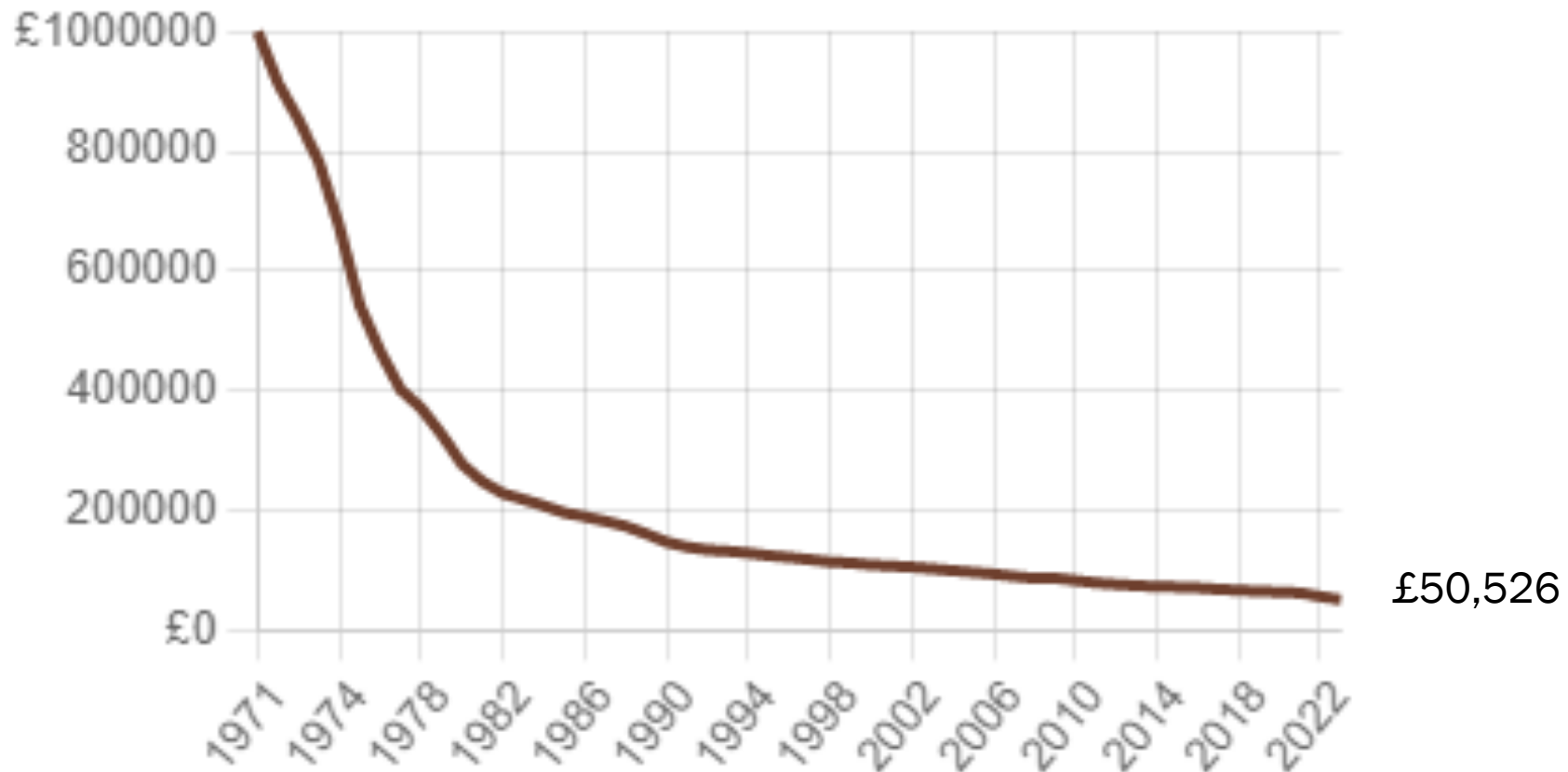
# POLITICAL DISTORTION OF 'FREE' MARKETS



**We Need to Talk  
About Inflation...**

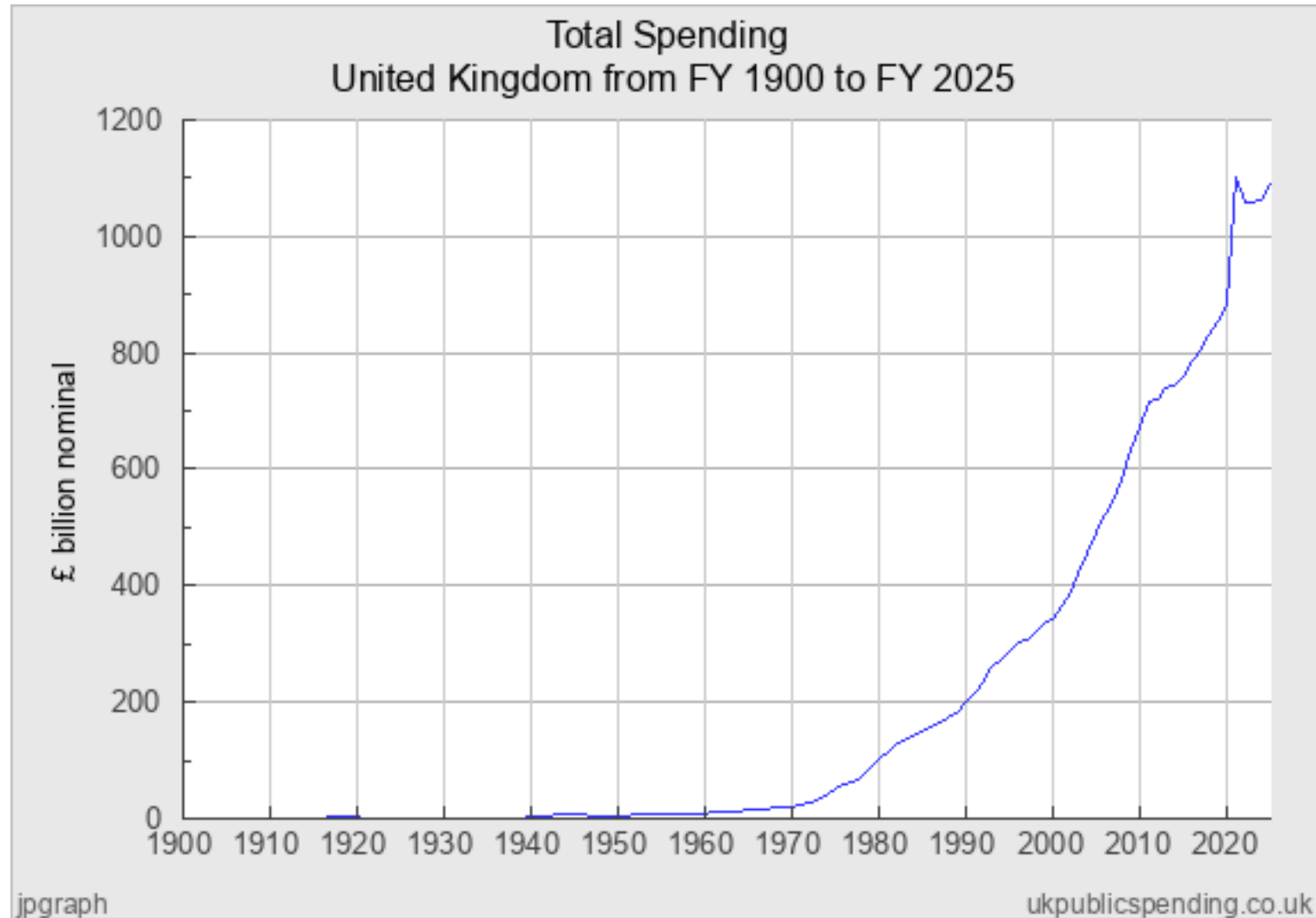
# Impact of Inflation Since 1971

Buying power of £1000000 over time, 1971-2023



# U.K. debt

- £2.6 trillion of debt now 101% of GDP, equal to £91,000 per household
- OBR forecasts debt servicing to cost £115 billion in 2023
- More than the department of education and ministry of defence budgets put together



# Where do our taxes go?

- 54.2% of households receive more in government hand-outs than they pay in taxes (36 million people)
- This excludes furlough payments and those who gave up work during the pandemic so next year's Net Dependency Ratio will be even higher
- The top 20% of non-retired households paid £41,087 more in taxes than they received in benefits
- The top 10% paid 53.1% of all income tax
- The top 20% paid 66.6% of all income tax

Source: Civitas report Jan 2023

# And it will get worse...

*“Over the next five years, we expect total receipts to rise by 20 per cent, faster than the growth in the cash size of the economy. We expect most taxes to rise more quickly than the growth of the economy as a whole, including income tax and corporation tax”,*

**Office for Budget Responsibility**

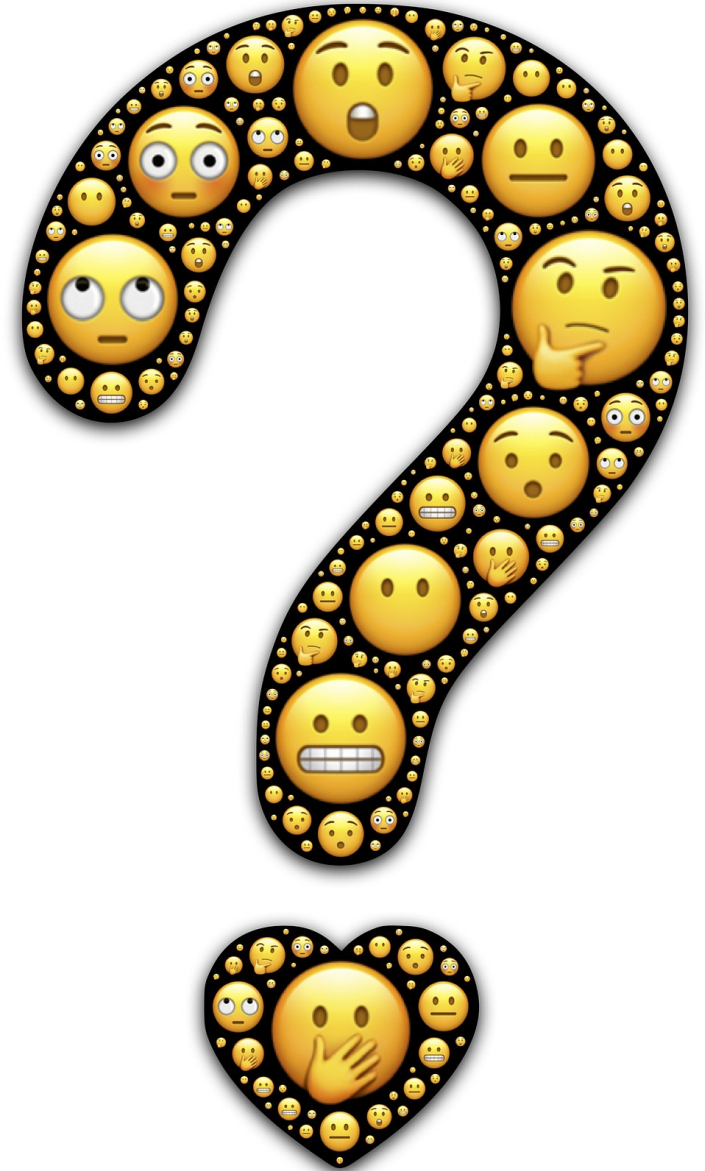


OUR ROLE...



# So How Do We Succeed?

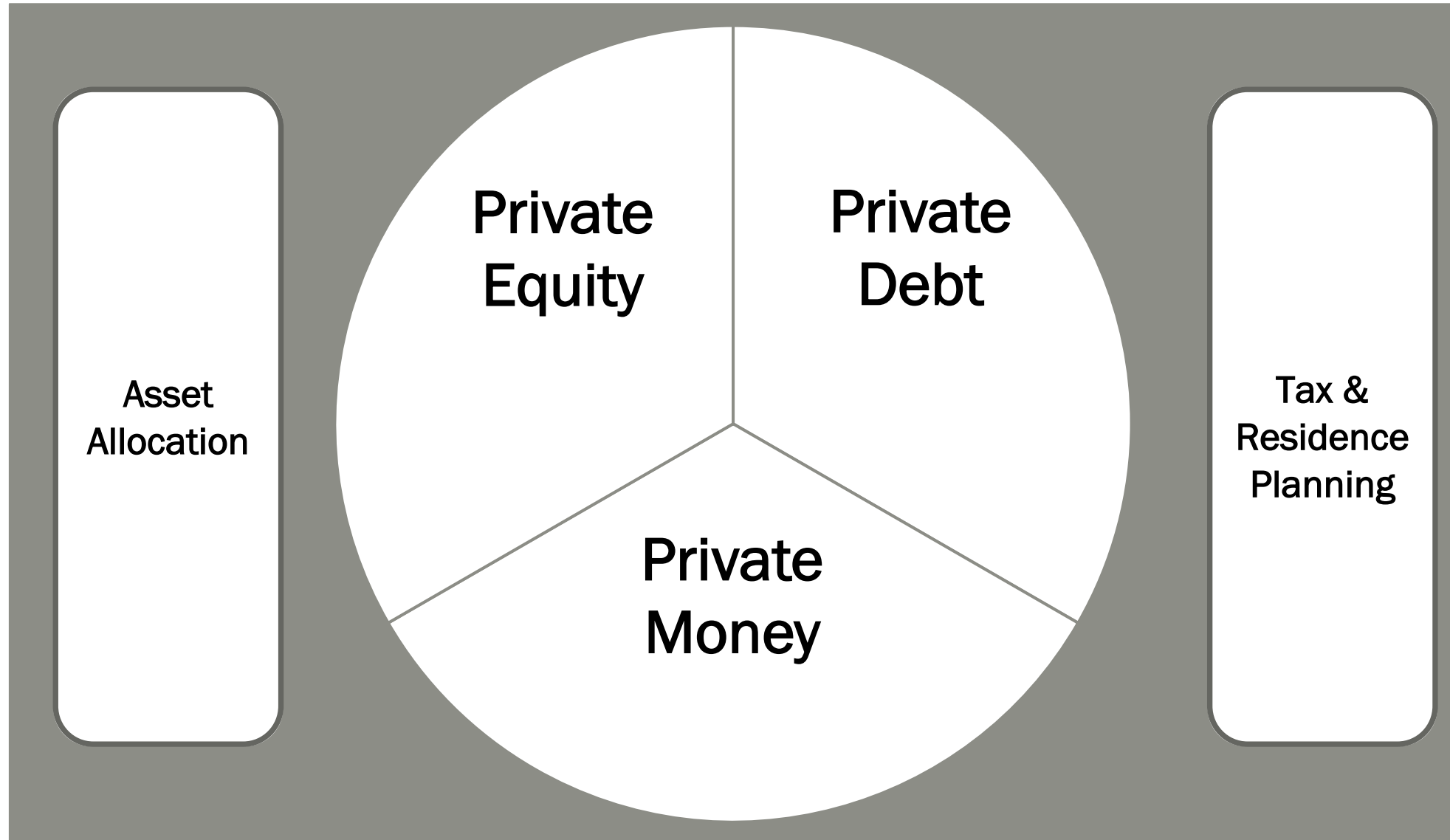
- An overall philosophy
- 3 strategies
- 2 portfolio management tools



BECOME A  
SOVEREIGN  
STEWARD



# The Winning Strategy for the 2020s



# Your Wealth Pyramid



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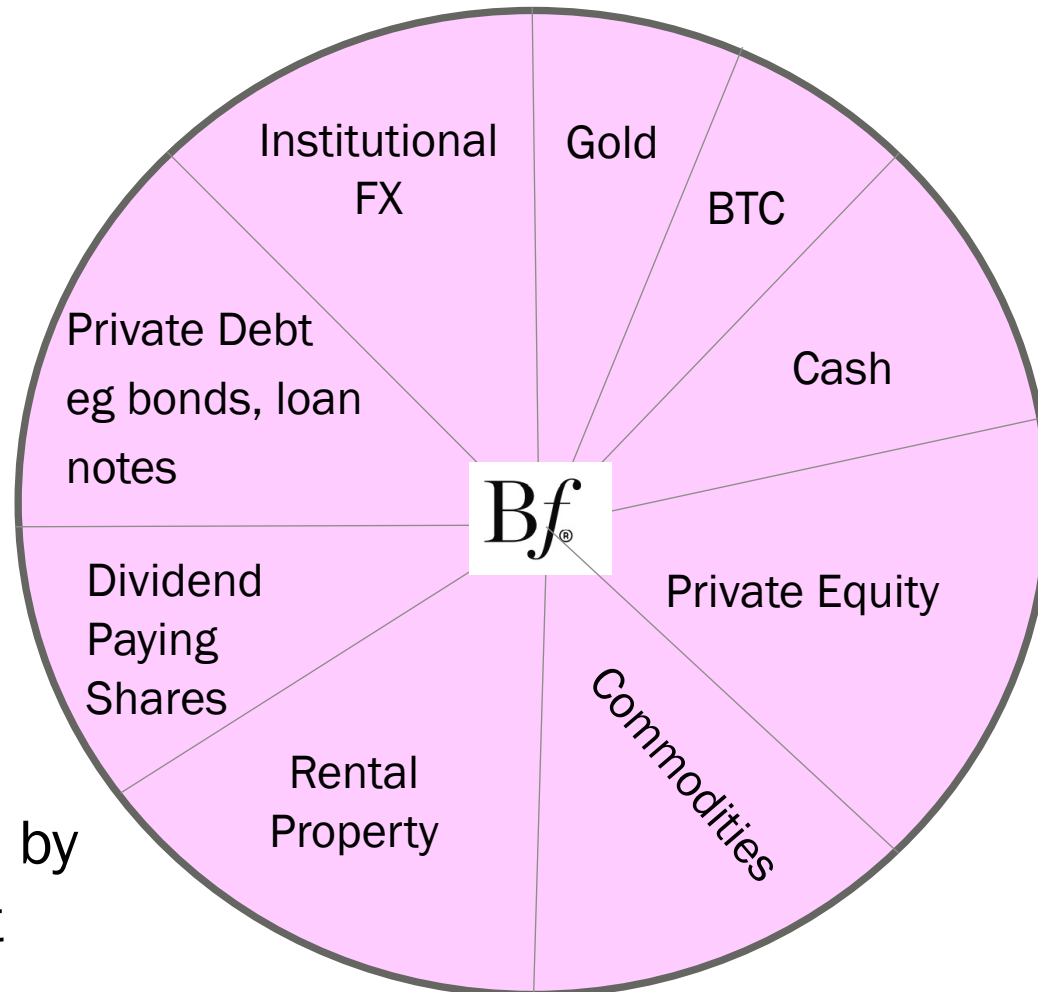
# The Beaufort Balanced Growth & Income Model Portfolio

## Income Assets

- Dividend paying publicly listed shares - 10%
- Institutional FX - 15%
- Private Debt - 15%
- Rental Property - 15%



Provided by Beaufort



## Growth Assets

- Private Equity - 15%
- Gold bullion - 5%
- Bitcoin - 5%
- Commodities - 10%
- Cash as dry powder - 10%



**Disclaimer:** This is a generic portfolio constructed for guidance purposes only. It does not represent specific investment advice which must be sought from a suitably qualified regulated financial adviser.



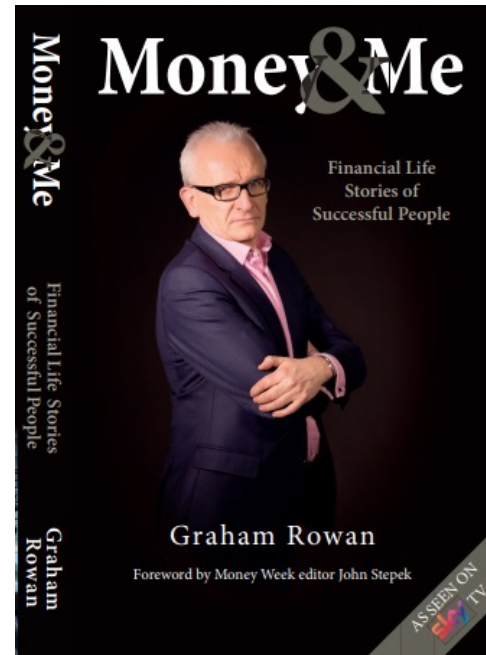
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# Summary

- Become the **Sovereign Steward** of your family's wealth
- Implement your Personal Gold Standard – **Private Money**
- Use **Private Equity** to create medium term wealth
- Use **Private Debt** and selected dividend paying public shares to create above-inflation income
- Re-evaluate your property portfolio
- Start thinking **globally** e.g. second residency

# Join Our Investor Community!

- Over 700 members in 37 countries
- No membership or investment fees
- See my interview with Jim Mellon
- A 60 minute video on our Model Portfolio
- A copy of my **Money&Me** book
- Come and see us on Stand M:24



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