

A background collage of numerous small, square portrait photographs of diverse people, mostly in professional or business-casual attire, arranged in a grid-like pattern. The entire image has a blue tint.

Beaufort
Society

“What people are
saying about the
Beaufort Society”

Feedback from our members and partners around the world

www.beaufortsociety.com



Who we are and what we do

We are a private members club for sophisticated and high net worth investors around the world. We empower our members to take control of their financial future and create multi-generational wealth through a combination of education, insights and guidance, access to a carefully curated portfolio of investments and to our cohort of subject matter experts on topics like tax planning, pensions and property development.



Graham Rowan
Chairman



Simon Walker
Investment Director



Paul Kingston
Property Director



Daphne Rowan
Ops Director

How are we unique?

Because we recognise that the system is broken. There is no one out there who has your financial wellbeing at the top of their agenda. The only person who really cares is looking back at you in the bathroom mirror.

So we want to give you the knowledge, tools and team that you need to be the conductor of your own Orchestra of Wealth. We are not financial advisers and we are not constrained by any regulatory body so we can bring you opportunities and ideas from anywhere in the world. We can give you all the information you need to make your own decisions based on your own investment strategy.

We believe the 2020s will be very different from the last 40 years. There will be big winners and big losers as the world changes at an ever faster pace. We want Beaufort Society members to be on the right side of history.

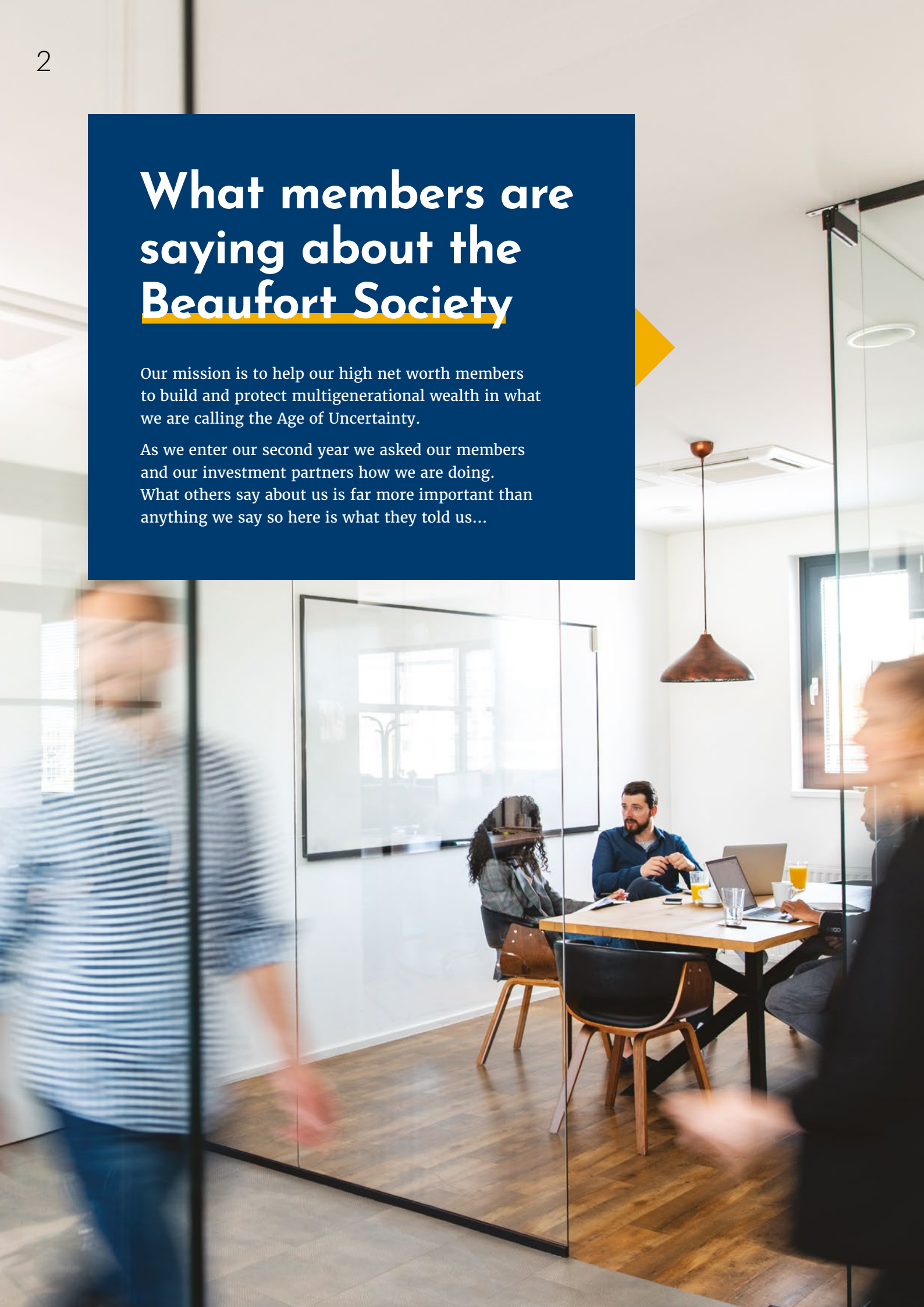
If that's what you want too, why not join us?



What members are saying about the Beaufort Society

Our mission is to help our high net worth members to build and protect multigenerational wealth in what we are calling the Age of Uncertainty.

As we enter our second year we asked our members and our investment partners how we are doing. What others say about us is far more important than anything we say so here is what they told us...



“As a financial professional myself I tend to put most of my own money into the mainstream investments that I recommend to my clients, but I feel it’s my responsibility to be aware of the alternative investments that are out there. And I have to say that Graham and Simon have brought me a steady stream of opportunities which have all been worthy of my time and attention.

So far I’ve invested both on a personal basis and through my company in a portfolio that includes a fast growing fintech group, a clean energy provider, a film about the Beatles and a litigation loan note. Graham is now heavily involved in the digital currency sector with his Crypto Research Institute programme and, while I don’t have time to become a crypto expert, his introduction to a digital asset hedge fund has enabled me to be a passive investor in a new financial world that is likely to impact us all.

What I really enjoy about being a member of the Beaufort Society is the breadth of the relationship that I’ve developed with the club. Through the fintech investment I was also privileged to be invited to join a Leadership Mastermind group led by Floyd Woodrow MBE. This, and the Beaufort Society’s own live events, have provided some great business and financial insights as well as fantastic networking opportunities.

I can’t think of any other organization that does what Beaufort Society does – if you’re serious about wealth creation and wealth protection I’d recommend joining the club.”

David R.

Chartered Financial Planner. Fellow of the Personal Finance Society. UK.

Beaufort Society Member

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George Charilaou

Property Investor

Beaufort Society Property
Connections Service

“After many years running my own dress manufacturing business I decided to step down from entrepreneurship to focus on building my property portfolio. There are only so many hours in a day and I have a lot of other commitments that keep me busy so I was looking for a way to invest in some really solid property development projects on a passive basis.

The problem is, where do you find the right joint venture partner and how do you know the project is worth investing in? It was really timely that I spoke to the Beaufort Society’s Paul Kingston just as they were launching their Property Connections service. While I obviously did my own due diligence before deciding to invest, Paul had done a lot of the work for me by finding and researching the developer, visiting the site of the project and analysing the project appraisal.

Armed with Paul’s findings I met the developer onsite and agreed in principle to provide the equity for the project. Paul went to great lengths to make sure that the shareholder agreement gave me as many protections as possible and educated the developer on why some changes were needed now that he was working with an equity partner. In a nutshell, I provide the equity on top of the development loan, the developer does all the work and we split the profits down the middle.

I’ve been really pleased to see Paul continuing to be involved in the project, visiting the site every month and sending me video updates. The offer is there for me to be more actively involved if I want to be, but right now it suits me to know that Paul is keeping an eye on everything on my behalf.

“I’ve been pleased to see Paul continuing to be involved in the project, visiting the site every month and sending me video updates”

If you’re thinking of getting involved in property development but are not sure of the best way to get started, have a chat with Paul and see if Property Connections could work for you.”



▲ Above: The Beaufort Society team at the official launch of the Property Connections Division

“We live in really uncertain times and, as an investor, it’s hard to know who to trust and what to invest in. I really enjoy Graham’s content and find that we have a similar view of the world. When I go to the Beaufort Society’s live events it’s great to meet like minded members and hear from some world class speakers. This plus the Youtube content gives me a lot to think about as I make my own plans.

One of Graham’s strongest messages has been the need to think globally as the country you are in right now may not be the place where you want to spend the rest of your life. I was able to have a 1:1 with Graham at the recent Property Investor Show and shared my plans with him. He gave me some really helpful pointers which I am now putting into action.

I’ve been to lots of investment based networking groups but I have not found anything else like the Beaufort Society where they cover everything from Big Picture macroeconomics down to very specific ways to build and preserve your wealth. The relationship has been life changing for me.”

Darek Sliwa

Global Investor

Beaufort Society Member

“I’ve been to lots of investment based networking groups but I have not found anything else like the Beaufort Society”

Peter Coy

Shipping Container
Entrepreneur, London.

Beaufort Society Member

“I found these guys almost by accident seeing the logo on their office window as I went past on the tube! I used the services of Mr Google and got in touch with Graham and the team.

I’ve always made my own investment decisions, mainly in property and shares, so it was a new departure to join a club for high net worth investors. I’d not really seen anything like it before so had no idea what to expect.

To get to know them better I went along to one of their live events in London. I enjoyed listening to Graham’s talk on the crypto world though I’m in no hurry to put my hard-earned cash into that just yet. At the event Paul Kingston talked about their Property Connections service and introduced me to one of the developers they work with.

A few weeks later I found myself on a building site south of Manchester looking at one of the Property Connections projects. I had a careful look at the appraisal, made sure the shareholder agreement was in order and that the potential sale prices were achievable.

But for me it’s about more than just the numbers. I’ve got to be comfortable with the people. Both Paul and the developer Shiro impressed me with their approach and their track record, so I was happy to provide a percentage of the equity that the project needed, in three stages, as the work progresses.

For a bit of diversification I’ve also made a small investment in a start-up company that comes with some good tax breaks through the EIS scheme.

At some stage I’m going to sell my shipping container business and I’ll certainly be looking to the Beaufort team to find a good home for some of the proceeds. Considering that I didn’t know what a club like this would be like, I have to say it’s been very useful thus far and I’m happy I joined.”

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▲ **Above:** Beaufort Society chairman Graham Rowan on stage at the Entrepreneur's Circle — we seem to especially resonate with business owners and property investors.

“From a young age I have been interested in wealth creation and have read widely on the topic. I am a Stoic by nature and pursue a considered life. A life of virtue. Therefore values are central to me and I have found a fantastic fit with Beaufort Society. The information and advice given by Simon and Graham is first rate, always topical and with a view on the future. I like to be thorough before making any investment and the availability of Simon and Graham have not only solidified investment decisions but have also led to second round positions. They are always available to give sound and valued input.

One should understand that abnormal potential returns also carry a risk burden yet the due diligence and dedication by Beaufort Society reduces exposure. A follow up raise of £300k in 10 days on a distressed recent investment due to a black swan event was a great example of their belief structure and dedication. Ultimately their intervention transferred a terminal situation into something with great potential. This is definitive proof that they cherish their investment community which is beyond the norm and my expectations. Trust is something that is earned and Simon, Graham and Beaufort Society have earned my trust. They exhibit a level of care which is not to be found elsewhere in the industry!”

Gordon White

General Manager,
multi-national mining
company. Panama.
Beaufort Society Member

“Trust is something that is earned and Simon, Graham and Beaufort Society have earned my trust. They exhibit a level of care which is not to be found elsewhere in the industry!”

Martin Prechner

Finance and Real Estate
Professional. Thailand.
Beaufort Society Property
Connections Service

“My background is in accountancy, corporate finance, real estate and investment so an organization like the Beaufort Society pushes a lot of buttons for me! I like Graham’s ‘Renegade’, somewhat anti-establishment approach and the fact that he brings such a broad business and investment background to bear on the content Beaufort produce. That broad remit is also evident in their live events where you hear from speakers on a wide range of topics from precious metals to property and from robot artists to corporate leadership coaches.

“I like Graham’s ‘Renegade’, somewhat anti-establishment approach and the fact that he brings such a broad business and investment background to bear on the content Beaufort produce.”

At its heart it’s a club for investors and I’ve been impressed by the variety of opportunities they’ve brought to me, based on Graham’s “Wealth Pyramid” approach to investing. Of course not every project resonates with your own circumstances, but so far I’ve invested in discounted gold, a fast growing fintech group, a film about Beatles manager Brian Epstein and a loan note that pays me quarterly passive income.

Being based part of the year in Thailand makes some of the live events a bit of a stretch, but thanks to the miracles of Youtube and Zoom I can still benefit from my Beaufort Society membership.”



How to join over 1,000 Beaufort Society members - for free!

- ✓ Go to beaufortsociety.com/self-certification/
- ✓ Complete the certification and membership forms
- ✓ Receive your welcome pack
- ✓ Enjoy our educational content
- ✓ Learn about our investments and property development joint venture opportunities
- ✓ Come to our live events

Beaufort Society Investment Partner Case Studies

If you are looking to raise £13 million from high net worth private investors please get in touch if your company offers any of the following:

- Outstanding capital growth potential, ideally linked to tax benefits such as SEIS/EIS
- A strong and well secured regular income stream
- Potential for significant royalty or dividend income
- A joint venture property development project where you are seeking a small number of liquid equity partners
- Willingness to craft a unique and exclusive investment opportunity
- An effective admin/legal support team to look after our members

Quantum Group

Investment Partner

Case Study

Beaufort Society

“Quantum Group is a fast growing UK based fintech incubator that is building a stable of businesses with the potential to become \$1 billion unicorns. Our group includes the Volopa multi-currency card aimed at corporate and high net worth clients and the Tail cashback rewards platform which brings thousands of offers to the clients of our participating partners.

The group was valued at £109 million in 2019 and we are on course to reach an enterprise value of £250 million during 2022. Unusually for a high growth technology business, we focus on profitability as well as scale so we expect to deliver substantial dividends to our shareholders as well as periodic liquidity events if we divest one of the group companies through an IPO or trade sale.

We use a four stage process to:

- Target and acquire companies with growth potential
- Analyse how we can optimize their potential and execute those changes
- Put in place the right structure to fully commercialise the business
- Scale the business and hold it until the right exit strategy presents itself.

The third of these stages, ‘structure and commercialise’, is the most capital intensive and it was the need to raise additional equity for two of our potential unicorns that made us turn to the Beaufort Society.

The relationship began as an opportunistic meeting between my co-founder Peter Malmstrom and Daphne Rowan, one of the principals of what is now the Beaufort Society. She brought in her husband Graham who met with us at our Group HQ in Mayfair to discuss raising capital for the group. We were impressed with the level of due diligence Graham carried out before accepting the assignment. He must have liked what he saw as he became one of the first to invest his own funds with us when we formally launched the raise in 2019!



QUANTUM

“By operating Beaufort as a private members’ club they seem to develop much deeper, multi-dimensional relationships with investors who appreciate having more than just a transactional relationship.”



I've worked with a lot of private equity firms and individual investors, but the Beaufort Society's approach is unique in my experience. Graham Rowan drives the process through well researched and expertly led webinar broadcasts then hands over to Simon Walker's team to manage the follow up with Beaufort Society's high net worth members. By operating Beaufort as a private members' club they seem to develop much deeper, multi-dimensional relationships with investors who appreciate having more than just a transactional relationship. That aligns perfectly with Peter and I's strategy of only welcoming shareholders that we would be happy to have dinner with!

One of the reasons I would attribute to the success of both funding rounds that we've undertaken with Beaufort Society is that they get to know the company almost as well as we do. They bring members of our senior team into the process and their obvious enthusiasm for the company rubs off on our team members. We quickly achieved our target of £1.8 million in late 2019 and then, with the need to add new capabilities to our Volopa and Tail platforms in 2021, we have raised a further £1.2 million over the summer despite the uncertainties that linger following the pandemic.

To have raised over £3 million from a few hundred of Beaufort Society's most active investors is a testament to the strength of their relationship with their members and their ability to describe an investment opportunity in a way that gets their attention. Simon then gets the potential investors on a call with Peter so they can have all their questions answered in real time by an authoritative voice of the group.

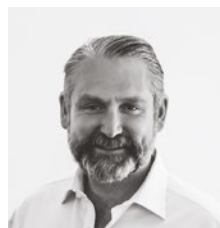
Both Peter and I have spoken at Beaufort Society's live events and I have been privileged to get to know some members on a deeper level through them joining my Leadership Mastermind Group. Beaufort have become not just a strategic capital raising partner but fellow evangelists for a renaissance in leadership and management for the twenty-first century.

I would wholeheartedly recommend a conversation with them."



Floyd Woodrow MBE
CEO
Quantum Group

With 24 years' service with 22 Special Air Service, experience with COBRA and as Head of the UK Counter Terrorist Wing, Floyd leads Quantum's team of experts, and was nominated as a top 50 fintech founder by leading industry publication The Financial Technologist. Floyd has an excellent track record of success as a Military Leader, Director and Negotiator, working with government agencies and police forces throughout the UK and overseas, assessing operational readiness and crisis management action plans. He also founded the Compass for Life Foundation in 2019, and delivers elite performance training to executives of some of the UK's biggest companies, as well as the UK National Health Service and other government agencies, including the Police and First Response Agencies.



Peter Malmstrom
Co-founder
Quantum Group

Peter trained as a commodity futures broker and foreign currency trader in the City of London, developing trading algorithms and pioneering, deliverable FX platforms. He spent two years with the Parachute Regiment and three years with 21 Special Air Service before joining Spectrum, and has since accumulated over 25 years of experience with specialist security providers, during which time he has also been active in assisting the development of several companies in the financial services sector. Peter has extensive contacts and experience across several market sectors, both in the UK and abroad and has worked closely with Floyd Woodrow on a number of high-level projects, prior to establishing specialist security company Valkyrie – and later Quantum Group – with Floyd in 2009.

“One of the reasons I would attribute to the success of both funding rounds that we’ve undertaken with Beaufort Society is that they get to know the company almost as well as we do. They bring members of our senior team into the process and their obvious enthusiasm for the company rubs off on our team members.”

“We spotted a gap in the UK litigation funding market where many solicitors now offer ‘No Win, No Fee’ services but struggle to fund the cash flow implications. In the past most litigation funders have focused on big, long, expensive cases with a binary outcome. You either win big or lose big and it might be three or four years before you get a decision.

We focus on low value, short term cases where the outcome is known and After The Event (ATE) insurance is in place. The most popular case types are Plevin, which is where excessive commissions were charged on PPI policies, and car finance loans such as PCP which look like being the next big mis-selling scandal. We take a first legal charge over the cases so we have as much security as it's possible to have. The result is that we've handled over 22,000 cases with no defaults and made every quarterly coupon payment on time to more than 700 investors.

When we first launched we knew we had a great business model but we had no track record, so bank funding was out of the question. We started with support from some high profile UK entrepreneurs and some UHNW clients of European private banks. We quickly realized that our growth was being constrained by a lack of capital so we needed to broaden our investor base. One of the people who'd introduced us to some of those European investors is also a personal associate of Simon Walker and Paul Kingston so we were introduced to the Beaufort Society.

Their members appreciated the high quarterly coupons our business model enables us to pay and, when Graham and I explained in a webinar how robust the Woodville business model is, Beaufort members were willing to look through the lack of accounts at Companies House and give us the benefit of the doubt.

That was over a year ago, during which time we have raised £1.22 million from 30 members and their faith has been repaid both in the regularity of the payments they have received and in the strong set of accounts now filed from our first full year of trading.

Such has been the success of our partnership that we are working exclusively with the Beaufort Society in the UK and will keep the terms of the loan note for a little longer until lower cost sources of funding are in place”.

Woodville Litigation Funding

Investment Partner
Case Study



*“We have raised
£1.22 million from 30
members—such has
been the success of our
partnership that we are
working exclusively with
the Beaufort Society in
the UK”*

Peter Legge
General Manager,
Woodville Litigation Funding.

Rebel Energy

Investment Partner Case Study



“The term ‘strategic partner’ is bandied around boardrooms to refer to any entity that has even the slightest connection with the business. In the case of the Beaufort Society those words are not strong enough to describe the critical role they have played in the creation, survival and growth of my company.”

“The Beaufort Society has been one of the most important partners in the Rebel Energy story – in fact there wouldn’t be a story without them! Their high net worth members invested almost £1 million in our seeding round which allowed us to build the brand, the team and to make a start on the robotic back office automation that is one of our key differentiators in the market.

Within days of launching the business in August 2021 we were hit by the biggest energy crisis since the 1970s as wholesale gas prices jumped 1000% in a matter of months. With much bigger companies than us going out of business almost overnight thanks to the retail price cap, we had a hard decision to make and there was a real risk that we would have to close the doors at Rebel Energy. I therefore had to make a tough call to Beaufort Society chairman Graham Rowan to inform him that his investors were likely to lose everything thanks to this unforeseeable curved ball.

He reminded me of the strong brand and mission we’d already created and the intellectual property that would still have value once the wholesale pricing crisis had passed. He suggested I draw up a ‘Hibernation and Market Re-entry plan’ and said that, if needed, he would go back to his investors to raise additional funds to see us through the crisis.

When I worked through the numbers it became clear that we needed £300,000 to fund the plan. But we only had 10 days in which to raise the funds and prove to our regulator OFGEM that we were financially viable. Graham chaired a webinar with myself and the senior Rebel team where we explained everything to our investors. Incredibly, in the week that followed, the Beaufort Society team were able to obtain additional commitments from over 90% of the original investors to provide the full £300,000 that we needed.

Since putting the plan in place we’ve had approaches from industry players and investors already in this space who are excited by our brand and our mission and want to discuss investing in all or part of the Rebel Energy business.

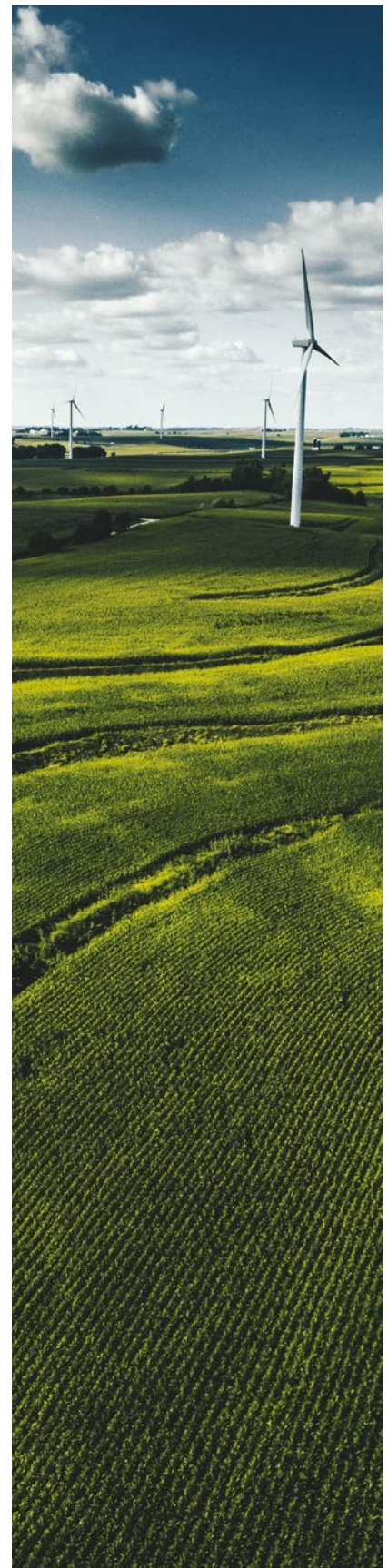
The term ‘strategic partner’ is bandied around boardrooms to refer to any entity that has even the slightest connection with the business. In the case of the Beaufort Society those words are not strong enough to describe the critical role they have played in the creation, survival and growth of my company. If you are looking to raise funds for your project, I wholeheartedly recommend a discussion with Graham to see if there’s a good fit.”



Dan Bates
CEO and Co-Founder
Rebel Energy

Our mission is to act differently, transform lives and create a business that can change society for good in an impactful and sustainable way. I set up Rebel Energy to make a positive and lasting impact on our world and in our society – making a genuine difference. We’re about rebelling against the status quo that says that fairly priced energy comes with poor customer service, that pays fat cat salaries to executives and that stops the poorest accessing the best services and prices. We want to challenge the concept of the ‘poverty premium’ and support people as they work their way out of poverty.

“The Beaufort Society has been one of the most important partners in the Rebel Energy story – in fact there wouldn’t be a story without them!”



What people are saying about Graham's Youtube channel

"Graham you're a very good interviewer. You do not interrupt your guests and you only interject at appropriate moments. Your channel deserves many more views. Bear in mind that when future historians will come to write the history of the early 21st century, they are likely to turn to high quality niche channels such as yours to use as sources of information as opposed to the 'mushy' mainstream channels."

Paul Sant, Malta

"Another great interview with the best comment at the end regarding the U.K's mental and moral sickness about denigrating successful people, and lionising drunken, drug-addled degenerates, and instead why we should be celebrating genuine achievements and learning as much as we can from them and modelling their actions. Keep up the good work chaps!"

Nick Wrathall

"Graham you have a great way of explaining complex issues into simple terms. Appreciated"

Marcus

"Brilliant interview with John Stepek, a guy who is very easy to listen to, has a very rational way of looking at things and puts his opinion over without sounding as if he knows it all (as so many do)."

B Hutcheon

"Mr Rowan, thanks for taking the time out to put this together... I know you don't need to but you are anyway so thank you once again for all the knowledge and wisdom"

Dadzilla Campbell

"Full of great insight. Thank you"

Tom Maloney

"Really enjoyed this, very insightful and what a sensible guy!"

Naheed Zaman

"Thanks Graham for bringing insightful people and helping viewers to understand market in more detail.. I am following many well known economist analysing US market and political conditions but no one doing it from UK. Glad I found you guys. Keep up the good work."

Vinny Kapoor

"Excellent. You are a top drawer interviewer. Many thanks"

Michael Ivanson

"Going through this channel, I must say it's highly underrated"

Badass Rick

"Very useful information. I completely agree, we have become a digital age nation where our every movement is now tracked. It all began with CCTV and since then it's just been less and less privacy. Thanks for the interesting thoughts."

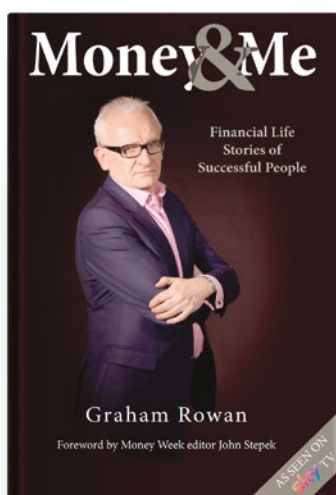
Rav Singh

THE RENEGADE INVESTOR
GRAHAM ROWAN
RENEGADE HYBRID RESOLUTION
CRYPTO & GROWN-UPS
Subscribe

Just search 'Graham Rowan' on Youtube if you want to subscribe



▲ **Above:** Graham interviews Claer Barrett from the Financial Times in the 48th floor Money&Me studio



A free book when you join us...

Your New Member Welcome Pack includes Graham's latest book, Money&Me, based on his Sky TV series where he interviews successful people to see what we can learn from them. There are 51 learning points listed at the end of the book, 3 from each interview.

Interviewees include:

- Money Week editor John Stepek
- Fund manager Justin Urquhart Stewart
- Hedge fund legend Lord Stanley Fink
- Financial Times Money editor Claer Barrett
- Wimbledon commentator John Inverdale
- GB News and Money Week's Dominic Frisby
- Precious metals expert Ross Norman

Useful resources from the Beaufort Society

- Learn more about the club at <https://beaufortsociety.com/>
- Learn about Property Connections at <https://www.propertyconnections.org/>
- Follow us on Youtube at <https://www.youtube.com/c/GrahamRowanWealth>
- Learn about cryptos at <https://www.crypto20index.com/>

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The private members club for high net worth investors

Membership website: beaufortsociety.com

Property JVs website: propertyconnections.org

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