
WHO WE ARE



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MY STORY

“How did I end up here?” is a question I sometimes ask myself, as at the beginning of my working life I’d have bet that no one (including me!) would have foreseen me becoming an owner of a successful business, managing a team of people.

As a kid I was animal mad, and always thought I’d end up working with animals rather than people. By the age of 18 I had had enough of education, and decided not to continue on to university after my A levels. Much to my parents’ horror I got a job as a kennel maid for a lady who was one of the top breeders of English Setters in the country at that time.

I loved the dogs, but it was never going to work long term. It wasn’t exactly mentally stimulating

and I couldn’t see a future for myself trotting round a show ring like they do at Crufts!

In my free time I had started to get involved in amateur theatre, backstage rather than on stage, and an opportunity came up for me to turn a hobby into a profession – this was in the early 80’s during the deep recession when Margaret Thatcher’s government launched a huge number of job creation schemes to get people into work. I joined the Wilde Theatre in Bracknell as a Technical Assistant and it was here that I met Eddie, the man who after some 25 years as my ‘significant other’ would later become my husband.

I had been working as a stage manager for some years, when in 1987 Eddie took a job in the drama department at Bristol University. Realising that job opportunities in the theatre would be limited, I decided to have a change

of direction and answered an advert in a local paper asking “Would you like to learn about unit trusts?” I didn’t have a clue what a unit trust was but the advert intrigued me.

The advertiser was a then little-known outfit called Hargreaves Lansdown. By June 1987, I had become one of their life and pensions administrators, but it didn’t take me long to realise that what I wanted to do was go out and advise clients and with strong encouragement from Peter Hargreaves and Stephen Lansdown, the owners of the business, I did just that.

After eight very happy years with the firm I realised that what I was most passionate about – financial planning, which was still very much in its infancy back then – wasn’t their main focus, and I joined the Bristol office of a national employee benefits and financial advice firm. This led to us relocating to Cornwall, where I developed a number of lawyer and accountancy firm clients. One of the accountancy firms approached me with a view to running a new financial planning arm they wanted to set up and I didn’t have to be asked twice.

It was during my time with them that it finally clicked for me why I do what I do: proper financial planning is not about the money, it’s about the people, and it turns out I really love working with people. Being someone’s trusted adviser is as much about the human and emotional side of things as it is about the financial side and building long-term relationships with clients means sharing so much more of their lives than their personal finances. Job satisfaction for me is all about helping people achieve their life goals and being there for them to help them

to meet the challenges they might face along the way.

It was the foot and mouth crisis of 2001 which really hammered this point home. I was working in North Devon when the disease hit, and the majority of my clients then were farmers. Eddie and I had a smallholding of our own by this point, although thankfully the disease never reached us just across the border in North Cornwall.

On my way to work I would drive past one of the sites which had been set up to deal with culled animals. Week after week after week I drove past the massive pyres of burning carcasses and I will never forget the stench of burnt flesh which filled the car every day.

During that time I had a review meeting scheduled with two of my favourite clients – an elderly couple, old enough to be my grandparents, but still farming full time. The day I turned up at their farm for our meeting was a few weeks after the compulsory culling of all of their cattle – a herd which they and generations of the family before them had bred and nurtured over more than 100 years.

The intended agenda of reviewing their financial plan went out the window. What they needed at that point was just someone to listen to them. We sat in their kitchen and the husband cried his heart out. Although victims of the foot and mouth outbreak were compensated for the loss of their animals in monetary terms, this was completely irrelevant at that meeting. No amount of compensation could replace what he had lost. My job on that day was simply to listen. Sometimes you can walk into a meeting

with an agenda and find yourself just having to park that and provide what the client needs.

I never forget that we are in an extremely privileged position. People share things with us that they don't tell anyone but their nearest and dearest. We share the good news and the bad with them and sometimes we get to hear things that nobody else hears.

Ever since those days in Cornwall Eddie and I have been raising livestock, and in 2007 we got married and upped sticks from the UK to renovate a dilapidated farmhouse with 35 acres in southwest France, taking 140 sheep and goats with us. We live in France full-time and I work from home, coming back to the office once a month for a week and making ad hoc visits in between if needed. At Bloomsbury, we've always made sure that the

business operates with the latest technological advances which has ensured that my location doesn't impact on the service we provide to our clients.

Since our move we've cut down on the sheep and goats but added three horses, three donkeys, four cats and two Pyrenean Mountain dogs to the mix. When I'm in the stables with the horses of an evening, and all is quiet –the only sound the calm munching of hay – I often reflect that if my animal-mad eight-year-old self could see me now she'd think she'd died and gone to heaven.

I believe I am very fortunate to have the best of both worlds – a job I love and exactly the kind of life I want outside work. I'm living my dream and I thoroughly enjoy helping our clients to live theirs.