

# Bowood Partners

*Fundamentally Invested in Your Prosperity for Generations*



**Suzanne C. Ford**  
**President, Bowood Corporations**  
**Registered Investment Advisor**



**Peter L. Giroux**  
**Co-Founder, Bowood Corporation**  
**Certified Financial Planner**

Since 1984, Suzanne has served and educated investors from New York City to Silicon Valley. As a Vice President with Lehman Brothers in New York, Suzanne developed experience and expertise in portfolio allocation, fundamental sector analysis, and fixed income and equity selection. Suzanne is an accomplished speaker, as well as a successful small business owner. A Registered Investment Advisor with the Arizona Corporation Commission, Suzanne provides her clients with personalized investment advice, financial planning, investor education, and a host of other personal finance services.

Suzanne's son, Peter joined her in 2005 after spending 9 years in the Financial Industry, including executive experience at Morgan Stanley. As a Certified Financial Planner™, Peter assists his clients with a Values-based planning approach. His expertise includes Risk Management through Asset Allocation and Insurance Planning, as well as Income and Tax Planning. Through Bowood Corporation, Peter and Suzanne own and operate 3 H&R Block Franchise locations in Arizona.

 **Financial Planning**  **Investment Advice**  **Education** 

P.O Box 8906  
Surprise, AZ 85374  
623-444-5948

472 E. Wickenburg Way  
Suite 202  
Wickenburg, AZ 85390  
928-684-0359

12550 W Thunderbird Rd  
Ste 104  
El Mirage, AZ 85335  
623-875-6111

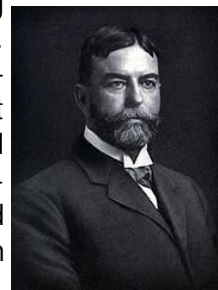
147 Riverside Dr  
Parker, AZ 85344  
928-669-6600

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## **A Family Legacy of Fundamental Investing**

Bowood Partners is the culmination of a family legacy of Investment Professionals, stretching back for 5 generations. It began with Suzanne Ford's Great Grandfather, Leonor Fresnel Loree. The famed President of the Delaware and Hudson Railroad from 1907 until 1938, Loree managed the investment portfolio of the Railroad's Retirement Fund, and was for a time, the largest investor on Wall Street. Suzanne's Grandfather David Collins, was both Loree's Son-In-Law and his personal stockbroker, who passed the family profession down, to his children, and his children's children, including Suzanne. In 2005, Suzanne's son, Peter, left Morgan Stanley and joined her at H&R Block Financial Advisors, where their team was among the most successful in the H&R Block network.



### *The Advisor Monthly*

A monthly investment newsletter featuring macro market analysis, sector analysis, three portfolio's of diversified investment recommendations with pertinent facts, recommended buy range, target sell price, investing tips and updates to past recommendations.

### *The Investor's Symposium*

Offered 3 times per year, The Investor's Symposium will afford the individual investor the fundamental knowledge and insights required for long term prosperity!

### *The Investor's Website*

An interactive website with online access to the latest investment ideas, financial news commentary, and portfolio updates. Webinars and podcasts give our clients the opportunity to have their questions answered, and polish up their Market Knowledge.

### *Personalized Investment Management*

With several packages to choose from, as well as custom plans upon request, we offer the range of services to meet your personal requirements. From monthly phone conferences and active investing advice, to a quarterly tax review or annual income analysis, our services are comprehensive.

### *Full Spectrum Financial Planning Services*

Custom Plans are available from a comprehensive Investment Policy Statement to a Detailed Needs Analysis.