

## Advisory Distributors

Tuesday 30 June 2015, Tylney Hall, Hampshire

Sponsored by:

### Participant List

#### CONFIRMED PARTICIPANTS

- **Alexander House Financial Services Ltd.** - Chief Operating Officer
- **Arthur J Gallagher** - Wealth Management Regional Director
- **Attivo Group** - Chief Investment Officer
- **Baigrie Davies** - Investment Analyst
- **Baker Tilly Corporate Finance LLP** - Associate Director, Corporate Finance
- **Beaufort Group** - Head of Distribution
- **Bellpenny** - Head of Direct Propositions
- **Continuum Financial Services LLP** - Managing Partner
- **Coutts & Co** - Planning and Advice
- **Foster Denovo** - Chief Executive Officer
- **Heartwood** - Head of Investment
- **Helm Godfrey Partners Ltd** - Managing Director
- **In Partnership** - Group Chief Executive
- **Jelf Group** - Chief Executive Officer - Financial Services
- **Kellands** - Managing Director
- **Kellands** - Director
- **LEBC** - Chief Operating Officer
- **Lighthouse Group Plc** - Group Operations Director
- **Mazars Financial Planning Ltd** - Chief Executive Officer
- **Mazars Financial Planning Ltd** - Managing Partner/ Central
- **Money Wise IFA Ltd** - Managing Director



BIRTHSTAR®



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- **Personal Touch Financial Services Ltd** - *Sales and Marketing Director*
- **Personal Touch Financial Services Ltd** - *Chief Executive Officer*
- **PFP Group** - *Partner*
- **Price Bailey Private Client** - *Partner/ Head of Private Client*
- **Price Bailey Private Client** - *Sales and Research Manager*
- **Punter Southall Financial Management Ltd** - *Principle*
- **Sandringham Financial Partners** - *Managing Director*
- **Saunderson House** - *Managing Director*
- **Savings Champion** - *Managing Director*
- **Sesame Bankhall Group** - *Managing Director*
- **Smith & Williamson** - *Head of Personal Financial Planning*
- **St James's Place Wealth Management** - *Large Business Acquisition*
- **Succession Advisory Services Ltd** - *Chief Executive Officer*
- **Succession Advisory Services Ltd** - *Chief Financial Officer*
- **Succession Advisory Services Ltd** - *Director of Platform Services*
- **Tenet Group Ltd** - *Chief Executive Officer*
- **Tenet Group Ltd** - *Distribution & Development Director*
- **The Private Office** - *CEO*
- **The Private Office** - *CEO*
- **Thomas Miller Investment** - *Director, Head of Managed Portfolio Service*
- **Thomas Miller Investment** - *Managing Director*
- **Towry** - *Head of Sales Strategy & Operations*
- **Towry** - *Head of Client Proposition*
- **True Potential** - *Head of Distribution*
- **Whitechurch Securities Ltd** - *Client Services Director*
- **Willis Owen** - *Managing Director*
- **Wren Sterling** - *Chief Executive Officer*

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## STRATEGIC PARTNERS

- **Birthstar** - *Managing Director (E)*
- **Birthstar** - *Head of Business Development*
- **Fidelity Worldwide Investment** - *Senior Strategic Account Manager*
- **Fidelity Worldwide Investment** - *Head of Trust and Tax Planning (E)*
- **FundsNetwork** - *Associate Director - Key Accounts*
- **Goldman Sachs Asset Management** - *Executive Director*
- **Goldman Sachs Asset Management** - *Head of Advisory Distribution*
- **Goldman Sachs Asset Management** - *VP Investment Management Division (E)*
- **Invesco Perpetual** - *Associate Director, Financial Institutions Group*
- **Just Retirement Ltd** - *Head of Strategic Accounts*
- **Rayner Spencer Mills Research** - *Director*
- **Sammedia** - *Chief Executive Officer (E)*
- **Sammedia** - *Business Development Director*
- **Square Mile Investment Consulting and Research Limited** - *Director*
- **Square Mile Investment Consulting and Research Limited** - *Managing Director (E)*

E = Expert

## SPEAKERS

- **The Rt Hon Steve Webb** - *Minister of State for Pensions 2010-2015*
- **Mr Tim Reid** - *Innovation Consultant, Creativity Trainer, Writer*
- **Capgemini Consulting, Financial Services** - *Mr Rod Bryson, Principal – Wealth, Long Term Savings & Insurance*
- **Capgemini Consulting, Financial Services** - *Mr Keith Webb, Director, Financial Services*

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## **FACILITATORS & GUESTS**

- **Aim Two Three llp** - *Managing Partner*
- **APFA** - *Director General*
- **BP&E Global** - *Director*
- **Capgemini Consulting, Financial Services** - *Principal – Wealth, Long Term Savings & Insurance*
- **Capgemini Consulting, Financial Services** - *Director, Financial Services*
- **Engage Insight** - *Managing Director*
- **EY** - *Senior Manager*
- **FCA** - *Head of Department for Investment Advisors & Platforms*
- **FCA** - *Technical Specialist*
- **INDEXX Markets** - *Director*
- **Institute of Financial Planning** - *Chief Executive Officer*
- **KPMG** - *Director - Strategy Group*
- **Paradox** - *Consultant*
- **Paradox** - *Consultant*
- **PFS** - *Consultant*
- **Rennison Consulting Ltd** - *Director*
- **TISA** - *Head of Distribution Engagement*
- **Unbiased Ltd** - *Chief Executive Officer*

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