

RETIREMENT MATTERS

Wednesday 25 September 2024, Royal College of Physicians, 11 St Andrews Pl, London NW1 4LE

Sponsors

Goldman Sachs | Asset Management



Standard Life
Part of Phoenix Group



Participant List

- **2 Plan Wealth Management**, *Independent Financial Adviser*
- **Aisa Professional**, *Chairman of the Investment Committee*
- **Anstee & Co**, *Managing Director*
- **Ascot Lloyd**, *Group Investment Director*
- **Atomos**, *Co Founder and CEO of My Time*
- **BNP Paribas**, *Director, Institutional Solutions*
- **BNP Paribas**, *Managing Director - Head of Equity Derivative Solutions*
- **Bordier & Cie**, *Head of Wealth Planning*
- **Bowmore Financial Planning**, *Managing Director*
- **Brewin Dolphin**, *Planner - Wealth Planning*
- **Brightwell Pensions**, *Chief Risk Officer*
- **Broadstone**, *Investment Director*
- **Broom Consultants**, *Director*
- **Canaccord Genuity Wealth Planning**, *Director of Wealth Planning*
- **Canaccord Genuity Wealth Planning**, *Non Executive Director*
- **Carrington Wealth Management**, *Financial Advisor*
- **Carrington Wealth Management**, *Head of Compliance and the Client Relationship Team*
- **Cavendish Medical**, *Chief Executive Officer*
- **Cavendish Medical**, *Senior Assistant Financial Planner*
- **Cavendish Ware**, *Associate Director*
- **Cavendish Ware**, *Associate Director*

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- **Cavendish Ware**, *Financial Adviser*
- **Cazenove Capital Management**, *Wealth Planning Director*
- **Charles Stanley**, *Managing Director - Charles Stanley Central Financial Services & Chief Client Officer*
- **China Construction Bank**, *Financial Crime Executive*
- **Chris Leach & Associates**, *Director & Chartered Financial Planner*
- **Chris Leach & Associates**, *Managing Director*
- **Church's Financial Planning**, *Managing Director*
- **Citi Private Bank**, *Head of Wealth Planning*
- **City Asset Management**, *Director, Head of Financial Planning*
- **Clarity Wealth Management**, *Chartered Financial Planner*
- **Close Brothers Asset Management**, *Paraplanner*
- **Connor Broadley**, *Chief Operating Officer*
- **Continuum**, *Head of Partnership Development*
- **Cormorant Partnership**, *Partner*
- **Corpad Wealth Management**, *Director of Financial Planning*
- **Coutts & Co**, *Financial Planning Product Manager*
- **Covenham Financial Services**, *Director IFA*
- **Defaqto**, *Head of Insight & Consulting (Investment & Protection)*
- **Defaqto**, *Wealth Analyst/Consultant*
- **EBCam**, *Managing Director*
- **Elevation Wealth Management**, *Account Executive*
- **Executive Advisory Services**, *Chairman*
- **Fidelity International**, *Head Of Wealth Management Advice*
- **Finli**, *Director & Independent Financial Planner*
- **Foster Denovo**, *Partner*
- **Generation Financial Services**, *Director*
- **HFMC Wealth Management**, *Financial Planning Manager*
- **HSBC Bank**, *Senior Customer Journey Lead - Build Investments & Financial Planning*
- **HSBC Bank**, *Strategy - Wealth & Retirement*
- **Handelsbanken Asset Management**, *Wealth Planning Team Leader*
- **Handelsbanken**, *Head of Wealth Management*
- **Harding Financial**, *Managing Director*
- **Hargreaves Lansdown Asset Management**, *Senior Analyst*
- **Hearnden Associates**, *Chartered Financial Planner*
- **Hearnden Associates**, *Director*
- **Hearnden Associates**, *Independent Financial Adviser*
- **In Partnership Financial Advisers**, *Chartered Financial Planner*

- **Integrity Wealth Solutions**, *Training & Compliance Manager*
- **Irwin Mitchell**, *Senior Manager*
- **Killik & Co**, *Partner & Head of Wealth Planning*
- **King Financial Planning**, *Managing Partner*
King Financial Planning, *Paraplanner*
- **Kingswood**, *Chief Operating Officer*
- **Liberate Wealth**, *Financial Planner*
- **Lockhart Capital Management**, *Head of Client Advice*
- **MASECO Private Wealth**, *Partner & Wealth Manager*
- **MI Capital Research**, *Insight Manager (Developments)*
- **MM Wealth**, *Managing Director*
- **Mazars Financial Planning**, *Proposition Manager*
- **Mazars**, *Partner, Financial Planning*
- **My Time Pension**, *Co-Founder*
- **Nedbank Private Wealth**, *Executive Head of Wealth Management*
- **New Leaf Distribution**, *Paraplanner*
- **Nicholls Stevens**, *Managing Director*
- **Oakfield Financial Services**, *Managing Director*
- **Oakfield Financial Services**, *Paraplanner*
- **Origen Financial Services**, *Director, Proposition and Marketing*
- **PK Financial Planning**, *Director*
- **Paradigm Norton Financial Planning**, *Head of Technical*
- **Penney, Ruddy & Winter**, *Director*
- **Pension Potential**, *Managing Director*
- **Pensionhelp**, *Compliance Consultant*
- **Pharon Independent Financial Advisers**, *Director*
- **Pharon Independent Financial Advisers**, *Paraplanner*
- **Pi Financial**, *Chief Executive Officer*
- **Pivotal Paraplanning**, *Director/Paraplanner*
- **RSMR**, *MPS Account Manager*
- **Rathbones Group**, *Technical Manager*
- **Redington**, *Senior Vice President, Defined Contribution Pensions*
- **Retirement Line**, *Director of Propositions & Corporate Partnerships*
- **Sandringham Financial Partners**, *Chartered Advising Partner*
- **Saunderson House**, *Chief Executive Officer*
- **Schroders Personal Wealth**, *Products & Propositions Manager*
- **Sesame Bankhall Group**, *Head of Wealth Propositions*

- **St. James's Place Wealth Management Group**, *Divisional Director, Business Development & Advice*
- **Stonehage Fleming Group**, *Director - Wealth Planning*
- **Tavistock Investments Plc**, *Corporate Development Director*
- **Throgmorton Private Capital Ltd**, *Investment Consultant*
- **Timothy James and Partners Ltd**, *Director*
- **Timothy James and Partners Ltd**, *Director*
- **Timothy James and Partners Ltd**, *Financial Adviser*
- **Titan Wealth Planning**, *Head of Proposition*
- **True Potential Wealth Management LLP**, *Financial Adviser*
- **True Potential Wealth Management LLP**, *Independent Financial Adviser*
- **True Potential Wealth Management LLP**, *Paraplanner*
- **True Potential Wealth Management LLP**, *Wealth Management Partner*
- **Unique Financial Planning**, *Chief Executive Officer*
- **VouchedFor**, *Chair & Founder*
- **WH Ireland**, *Wealth Planner*
- **Walden Capital**, *Director*
- **Walpole Financial Ltd**, *Chartered Financial Planner*
- **Willis Owen Limited**, *Head of Investment, Product & Regulatory Affairs*
- **Wise Investment**, *Head of Paraplanning*
- **Wise Investment**, *Senior Financial Planner*

SPONSORS & EXPERTS

- **GSAM**, *Executive Director, UK & Ireland Retail Client Business*
- **Iress**, *Senior Business Development Manager*
- **LV=**, *Divisional Manager, Equity Release*
- **LV=**, *Equity Release Partnership Development Manager*
- **LV=**, *Partnerships Development Manager*
- **Legal & General Retail**, *Distribution Director, Retail Annuities*
- **Standard Life UK (part of the Phoenix Group)**, *Head of Retail Distribution*
- **Standard Life UK (part of the Phoenix Group)**, *Head of Strategic Partnerships*
- **WealthOS**, *CEO & Founder*
- **WealthOS**, *Chief Commercial Officer*
- **WealthOS**, *Partnerships Consultant*

FACILITATORS & SPEAKERS

- **Bovill (Acquired by Ocorian)**, *Principal Consultant*
- **Catalyst Partners**, *Partner*
- **Crane Consulting**, *Consultant*
- **Fintel**, *Managing Director*
- **FoxRed Insight**, *Director*
- **Freelance**, *Journalist and consultant*
- **GSAM**, *DC and Retirement Strategy*
- **Goldman Sachs Asset Management**, *Managing Director, Head of Defined Contribution*
- **Independent Consultant**, *Director*
- **Institute of Fiscal Studies**, *Director*
- **LCP**, *Partner*
- **Savanta**, *Director, Client Development*
- **Tata Consultancy Services (TCS)**, *Head of UK FS Customer Transformation*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **GDR Creative Intelligence**, *CEO*
- **LCP**, *Partner*
- **Moneyhub**, *Business Development Manager*
- **PwC**, *Consulting Director*
- **Vanguard**, *Strategic Account Manager*