

Tuesday 29 September 2026, Birmingham Repertory Theatre, Birmingham, B1 2EP

Delegates

- **2 Plan Wealth Management Limited,** *Independent Financial Adviser*
- **2 Plan Wealth Management Limited,** *Chartered Financial Planner*
- **2 Plan Wealth Management Limited,** *Independent Financial Adviser*
- **2 Plan Wealth Management Limited,** *IFA*
- **2 Plan Wealth Management Limited,** *Managing Director*
- **Aaron Tawny Mortgages Limited,** *Managing Director & IFA*
- **Abacus Associates Financial Services Ltd A/R Saltus,** *IFA*
- **Absolute Financial Management Ltd,** *Managing Director*
- **Acacia Wealth,** *Wealth Adviser*
- **Acornmain Ltd,** *IFA*
- **Advanta Wealth Ltd,** *Head of Acquisitions*
- **Advanta Wealth Ltd,** *Group Head of M&A*
- **Advice Wise Ltd,** *Director*
- **Advice Wise Ltd,** *Director*
- **Affinity Financial Management Limited,** *Director*
- **AFH Wealth Management Nantwich,** *Divisional Director*
- **AHL Financial,** *IFA*
- **Alexander Green & Partners Ltd,** *Director*
- **Apogee Wealth Management Limited,** *Head of Client Services*
- **Apogee Wealth Management Limited,** *Head of Compliance & Risk*
- **Artorius Wealth Ltd,** *Head of Wealth Planning*
- **Artorius Wealth Ltd,** *Chief Executive Officer*
- **Asher Wealth Consultancy,** *CEO*
- **AspireLane Wealth Planning Ltd,** *Director*
- **Atomos,** *Wealth Consultant*
- **Attivo Group,** *Chief Risk Officer*
- **Atwal Wealth Management,** *Managing Director*
- **Aurora Financial IFA Limited,** *Director*
- **Austin Lakin Clark Ltd,** *Independent Financial Adviser*
- **Azets Wealth Management,** *Chief Operating Officer*
- **Azets Wealth Management,** *Group M&A Director*
- **Baggette & Company Wealth Management Limited,** *Managing Director*
- **Baggette & Company Wealth Management Limited,** *CEO*
- **Bamboo Invest,** *Co-founder*
- **Bamboo Invest,** *CEO*
- **Bank J. Safra Sarasin Ltd,** *Relationship Manager*
- **Barclays Bank Plc,** *Team Leader*
- **Barclays Wealth & Investment Management UK,** *Wealth Planning Head of Distribution*

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Delegates

- **Barclays Wealth & Investment Management UK,** *Team Manager Planning and Advice*
- **Beadvised Ltd,** *Independent Financial Adviser*
- **Beadvised Ltd,** *Independent Financial Adviser*
- **Beadvised Ltd,** *Paraplanner*
- **Becketts Fs Ltd,** *Director*
- **Beechgrove Financial Planning,** *Financial Planner*
- **Belle Financial Services Limited,** *IFA*
- **Beyond Advice Group (formerly Markland Hill Wealth),** *Head of Operations*
- **Beyond Advice Group (formerly Markland Hill Wealth),** *Chief Executive Officer*
- **Beyond Advice Group (formerly Markland Hill Wealth),** *Technical Support Consultant*
- **Blackdown Financial Services Limited,** *Director*
- **Blackdown Financial Services Limited,** *Operations Manager*
- **Blackdown Financial Services Limited,** *Financial Planner*
- **Blackdown Financial Services Limited,** *Managing Director*
- **Blackstone Moregate Ltd,** *Chief Executive Officer*
- **Bowmore Financial Planning Limited,** *Head of Private Client*
- **Brian Mellor Financial Services Limited,** *Compliance Manager*
- **Brilliance Financial Planning Ltd,** *Wealth Manger*
- **Britannic Place Financial Management,** *Chartered Financial Planner*
- **Broom Consultants Ltd,** *HR Manager & Board Director*
- **Broom Consultants Ltd,** *Chief Financial Officer*
- **Broom Consultants Ltd,** *Director*
- **Burlington Associates Ltd,** *Director*
- **C Hoare & Co,** *Partner*
- **Cadence Financial Management,** *CEO*
- **Capelin Financial Management Ltd,** *Managing Director*
- **CBFP UK Ltd,** *Executive Director*
- **CBFP UK Ltd,** *Financial Planner*
- **Chancery Lane Income Planners Ltd,** *Financial Planner*
- **Charity Bank,** *Head of Strategic Initiatives*
- **Charlesworth Financial Planning,** *Managing Director*
- **Chartered Financial Solutions Limited,** *Chartered Financial Planner*
- **Chatfield Private Client Ltd,** *Director*
- **Cheltenham Independent Financial Advisers Ltd,** *Client Services Assistant*
- **Cheltenham Independent Financial Advisers Ltd,** *Client Relationship Manager*
- **Chris Leach & Associates Ltd,** *Director & Chartered Financial Planner*
- **Clark Gillone A/R Finli Group,** *Director*
- **Clayton Holmes Naisbitt Limited,** *Chartered Financial Planner*
- **Clear Financial Solutions (Midlands) Ltd,** *Chartered Financial Planner*
- **Clear Financial Solutions (Midlands) Ltd,** *Financial Adviser*
- **Collingbourne Wealth Management Ltd,** *Director*
- **Colmore Partners,** *Managing Director*
- **Colmore Partners,** *Chartered Financial Planner*
- **Colmore Partners,** *Director*
- **Cooper Parry Wealth,** *Client Relationship Director*
- **Copia Capital Management,** *Business Development Manager*
- **Copia Capital Management,** *Director of Sales*
- **Coutts & Co,** *Head of Advice Policy & Supervision*
- **Coutts & Co,** *Director Advice & Suitability*
- **Covington's Financial Service Limited,** *Managing Director*
- **Criterion,** *Business Development Manager*
- **Criterion,** *Business Development Manager*

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Delegates

- **Crowe Financial Planning UK Limited,** *Compliance Director*
- **CRS Consultants Limited,** *Independent Financial Adviser*
- **CRS Consultants Limited,** *Director & Financial Adviser*
- **Culverhouse Financial Planning Ltd,** *Director*
- **Dodd & Co Wealthcare,** *Director*
- **Dodd & Co Wealthcare,** *Financial Adviser*
- **Dodd & Co Wealthcare,** *Director*
- **Dodd & Co Wealthcare,** *Director*
- **Downing LLP,** *Fund Manager of MGTS Downing Fox Funds*
- **Downing LLP,** *Fund Manager*
- **Eleven Eleven Financial,** *Financial Adviser*
- **Evelyn Partners,** *Head of Financial Planning Advice*
- **Evelyn Partners,** *Head of Regulatory Developments*
- **Evelyn Partners,** *Regional Managing Partner*
- **Fairstone Group,** *Chief Financial Planning Officer*
- **Fairstone Group,** *Business Development Executive*
- **Fairstone Group,** *Chief Product & Proposition Officer*
- **Fairstone Group,** *Principal/Financial Planner*
- **Fensham Howes Ltd,** *Managing Director, Private Client*
- **Fingerprint Financial Planning,** *Financial Planner & Principal Partner*
- **Finli Group,** *Director - Finli Group*
- **Fintel,** *Chief Executive Officer, Fintel Services Division*
- **Five Wealth Ltd A/R Sense Network,** *Chartered Financial Planner*
- **Forvis Mazars Financial Planning Limited,** *Operational Change Lead*
- **Forvis Mazars Financial Planning Limited,** *Traineeship Associate Manager*
- **Forvis Mazars Financial Planning Limited,** *Compliance Associate Director*
- **Forvis Mazars Financial Planning Limited,** *Proposition Associate Director*
- **Furnley House Ltd,** *Business Development Principal*
- **Gemini Wealth Management,** *Head of Advice*
- **Goalistic,** *Managing Director*
- **Hargreaves Lansdown Asset Management Limited,** *Head of Financial Advice*
- **Hargreaves Lansdown Asset Management Limited,** *Head of Advisory Operations*
- **Hawsons Wealth Management Limited,** *Head of Advisory*
- **Hawsons Wealth Management Limited,** *Head of Risk & Governance*
- **Hazelton Mountford Jefferies Limited,** *Independent Financial Adviser*
- **Hazelton Mountford Jefferies Limited,** *Independent Financial Adviser*
- **HCL Bank House Financial Services Limited,** *Director*
- **HCL Bank House Financial Services Limited,** *Director*
- **HCL Bank House Financial Services Limited,** *Compliance & Training Manager*
- **Heligan Wealth Management,** *Investment Director*
- **Henry Spain Investment Services Limited (Postcode: LE16 7AF),** *COO*
- **Holyoakes Group Ltd,** *Director of Financial Planning*
- **HSBC Bank Plc,** *Managing Director*
- **Hybrid Advice,** *Chief Executive Officer*
- **Hybrid Advice,** *Finance Director*
- **Hymans Robertson Personal Wealth LLP,** *Head of Operations & Risk*
- **IFAC,** *CEO*
- **IFAC,** *Mortgage Compliance Consultant*
- **Ifamax Limited,** *Financial Planner*
- **Independent Consultant,** *Investment Manager*
- **Independent Consultant,** *Technology Director*
- **Independent Consultant,** *former Head of Investment Management Compliance*

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Delegates

- **Independent Consultant,** *was Private Client Director at Bowmore Asset Management*
- **Informed Financial Planning,** *Managing Director*
- **Integrity365,** *Chartered Financial Planner*
- **Integrity365,** *Independent Financial Adviser*
- **IPS Capital LLP,** *Wealth Planner*
- **IronMarket Ltd,** *Ntwrk CEO*
- **IronMarket Ltd,** *Head of Operation*
- **Isio Wealth Planning,** *Head of Region*
- **Jane Newman Financial Planning Ltd,** *Director*
- **Jane Newman Financial Planning Ltd,** *CEO*
- **Jigsaw Tree Limited,** *Operations Director*
- **Julius Baer International Ltd,** *Head of Digital Channels*
- **Just,** *Investment and Financial Planning Director*
- **Landmark IFA Ltd,** *Trainee Paraplanner*
- **Landmark IFA Ltd,** *Director*
- **Leodis Wealth Management A/R Amber River,** *Head of Financial Planning*
- **Liberate Wealth,** *Managing Director*
- **Lifetime Financial Management,** *IFA*
- **Lightside Financial Planning,** *Director*
- **Lynas Vokes Investments Ltd,** *Financial Planner*
- **Lynas Vokes Investments Ltd,** *Director*
- **Lynas Vokes Investments Ltd,** *Managing Director*
- **Lynas Vokes Investments Ltd,** *Chartered Financial Planner*
- **Mattioli Woods Plc,** *Wealth Management Consultant*
- **McGarrie Vahey & Partners,** *Director*
- **McInroy & Wood Ltd,** *Chief Executive Officer*
- **Meriden Financial Planning Limited,** *Director*
- **Mint Wealth Management,** *MD & Founder*
- **Moai Wealth,** *Founder & CIO*
- **Money Adviser LLP,** *Independent Financial Adviser*
- **Money and Pensions Service,** *Policy and propositions manager*
- **Montfort International Limited,** *Associate*
- **Montfort International Limited,** *Principal*
- **Morningstar Wealth Limited,** *Business Development Manager*
- **Morningstar Wealth Limited,** *Strategic Partners Manager*
- **MSBM Wealth Limited,** *Financial Adviser*
- **MWA Financial,** *Partner Private Wealth*
- **My Time Pension,** *Co Founder and CEO*
- **Need Financial Planning Ltd,** *Financial Planner and Director*
- **Nelsons Solicitors Limited,** *Partner and Chartered Financial Planner*
- **Newbold Wealth Management Limited,** *Director and Chartered Financial Planner*
- **Newcastle Financial Advisers Limited A/R Openwork Ltd,** *Operations Team Leader*
- **Newcastle Financial Advisers Limited A/R Openwork Ltd,** *Divisional Manager*
- **Newcastle Financial Advisers Limited A/R Openwork Ltd,** *Performance & Development Partner*
- **NFP Financial Planning Limited,** *Financial Planning Business Operations Manager*
- **NFP Financial Planning Limited,** *Head of Retirement & Financial Planning*
- **Nicholls Stevens (Financial Services) Limited,** *Managing Director*
- **Oakfield Financial Services Limited,** *Managing Director*
- **One Financial Solutions Ltd,** *Director*
- **Paladin Group,** *Director*
- **Parmenion Capital Partners LLP,** *Chief Commercial Officer*

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Delegates

- **Parmenion Capital Partners LLP,** *Intermediary Distribution Director*
- **Paul Russell Financial Services,** *Director*
- **Pensionhelp Limited,** *Business Development Manager*
- **Philanthropy Impact,** *Director of Membership and Development*
- **Phoenix Financial Advisers Limited,** *Independent Financial Adviser*
- **Pi Financial Ltd,** *Corporate Adviser*
- **Pi Financial Ltd,** *Managing Director*
- **Pi Financial Ltd,** *Chartered Financial Planner*
- **Plain Savings Ltd,** *Managing Director*
- **Plain Savings Ltd,** *Senior Paraplanner*
- **Platforum,** *Head of Editorial Strategy*
- **Pool House Group,** *Co-Owner & Director*
- **Portcullis Financial Planning Limited,** *Director*
- **Portfoliometrix Asset Management Ltd,** *Partner Development Manager*
- **Portfoliometrix Asset Management Ltd,** *CEO*
- **Practical Action,** *Philanthropy Executive*
- **Prime Wealth Solutions,** *Managing Director*
- **Protocol Capital Management Limited,** *Principal*
- **Protocol Capital Management Limited,** *Operations Manager*
- **Purposeful Group (formerly Finitor Wealth),** *Chairman*
- **QPI Ltd,** *Business Development Director*
- **Quartet Capital Partners LLP,** *Managing Partner*
- **Queen's Park Equity LLP,** *Investor*
- **Quilter Financial Planning,** *Managing Director – Quilter Academy and adviser development.*
- **Quilter plc,** *Business Consultant*
- **Radcliffe & Co Life & Pensions Limited,** *Head of Compliance*
- **Raymond James Wealth Management,** *Managing Director, Central Financial Services & Chief Client Officer*
- **Raymond James Wealth Management Limited,** *Chief Commercial Officer*
- **RBC Brewin Dolphin Limited,** *Wealth Paraplanner*
- **RBC Wealth Management (Royal Bank of Canada),** *Chief Operating Officer*
- **Readymoney Investments Limited,** *Director*
- **Real Wealth Partners,** *Founding Director*
- **Red Circle Financial Planning,** *Chartered Financial Planner*
- **Redington (Acquired by Arthur J. Gallagher & Co),** *Vice President*
- **Retirement Planning (UK) Ltd,** *IFA*
- **Retirement Planning (UK) Ltd,** *Director & Owner*
- **Richardsons Financial Services Limited,** *Financial Adviser*
- **Richardsons Financial Services Limited,** *Director*
- **Robert Nicholas Financial Advisers Ltd (Postcode: tf10 7ay),** *Chartered Financial Planner*
- **Robert Nicholas Financial Advisers Ltd (Postcode: tf10 7ay),** *Director*
- **Rockhold Asset Management,** *Investment Director*
- **Roebridge Financial Management Limited,** *Managing Director*
- **RSQ Wealth Management,** *Director and Co-Founder*
- **RSQ Wealth Management,** *Director and Co-Founder*
- **S&W,** *Associate Director*
- **Salisbury House Limited A/R Openwork,** *Operations Director*
- **Sandringham Financial Partners Ltd A/R M&G plc,** *Chartered Financial Planner*
- **Sandringham Financial Partners Ltd A/R M&G plc,** *Financial Planner*
- **Shakespeare Martineau LLP,** *Legal Director*
- **Shakespeare Martineau LLP,** *Associate*
- **Shard Capital,** *Chief Operating Officer*

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Delegates

- **Sheavyn Associates Financial Management Limited,** *Financial Adviser*
- **Significant Financial Limited (Postcode: SY7 9QL),** *Financial Adviser*
- **Significant Financial Limited (Postcode: SY7 9QL),** *Financial Adviser*
- **Soderberg & Partners,** *Managing Director*
- **Soderberg & Partners,** *Business Development Manager*
- **Soderberg & Partners,** *Growth Manager*
- **Soderberg & Partners,** *Growth Manager*
- **Sovereign Financial Planners Limited,** *Financial Adviser*
- **Sovereign Financial Planners Limited,** *Financial Adviser*
- **Sovereign Financial Planners Limited,** *Managing Director*
- **Sovereign Financial Planners Limited,** *Financial Adviser*
- **Sovereign Financial Planners Limited,** *Financial Adviser*
- **St James's Place,** *Director - Advice Policy*
- **St. James's Place Wealth Management Group,** *Head of Advice Policy (non pensions)*
- **Standard Life,** *Senior Pensions Product Manager*
- **Step By Step Financial Solutions Ltd,** *Financial Adviser*
- **Step-by-step Financial Planners Ltd,** *Chief Compliance Officer*
- **Stirling House Financial Services Ltd,** *IFA*
- **Storeton Rose Financial Planning Ltd A/R 2plan,** *Practice Manager*
- **Storeton Rose Financial Planning Ltd A/R 2plan,** *Director & Chartered Financial Planner*
- **Succession Wealth,** *Head of Marketing*
- **Succession Wealth,** *Planner*
- **Succession Wealth,** *Director of Brand and Corporate Affairs*
- **Succession Wealth,** *Area Manager*
- **Sutton Oaks Wealth Management Limited,** *Chartered Financial Planner*
- **Swithin Lane Advisory Ltd,** *Director*
- **SYB Consulting Limited,** *Director*
- **Sylva Financial Planning,** *Director*
- **Tacit Investment Management,** *Director*
- **The Aspire Partnership LLP,** *Partner*
- **The Aspire Partnership LLP,** *Partner & Financial Planner*
- **The Aspire Partnership LLP,** *Financial Planner*
- **The Aspire Partnership LLP,** *Chartered Financial Planner*
- **The Aspire Partnership LLP,** *Partner*
- **The Aspire Partnership LLP,** *Managing Partner*
- **The Aspire Partnership LLP,** *Partner*
- **The Aspire Partnership LLP,** *Partner*
- **The Family Elephant,** *Founder/Director*
- **The Openwork Partnership,** *Head of Partnership Services*
- **The Private Office,** *Snr Partner & Financial Planner*
- **The Private Office,** *Head of Quality Assurance*
- **The Private Office,** *Chief Marketing Officer*
- **The Private Office,** *DME*
- **The Private Office,** *Head of Marketing*
- **The Stonegate Wealth Group Ltd,** *Managing Director*
- **The Stonegate Wealth Group Ltd,** *Independent Financial Adviser*
- **The Superbia Group,** *Head of Financial Planning*
- **Thomson Gray Wealth Management Ltd,** *Director*
- **Thomson Gray Wealth Management Ltd,** *Director*
- **Timothy James and Partners Ltd,** *Director*
- **Timothy James and Partners Ltd,** *Financial Adviser*
- **TK White & Co Limited,** *Director*

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Delegates

- **TK White & Co Limited,** *Administration Manager*
- **True Potential Wealth Management LLP,** *Paraplanner*
- **True Potential Wealth Management LLP,** *Wealth Management Partner*
- **True Potential Wealth Management LLP,** *Research Administrator*
- **True Potential Wealth Management LLP,** *Wealth Management Partner*
- **Unbiased,** *Financial Adviser*
- **Utopia Wealth Planning Ltd,** *Director*
- **Utopia Wealth Planning Ltd,**
- **Validpath Ltd,** *Proposition Director*
- **Validpath Ltd,** *Chief Commercial Officer*
- **Velia Partners,** *Founder & Managing Director*
- **Verso Wealth Management,** *Group T&C Manager*
- **Walden Capital,** *Director*
- **Walker Crips Wealth Management Limited,** *Director - Investment Management*
- **Warden Consulting,** *Founder*
- **WDS Wealth Management Ltd,** *Equity Partner & Director*
- **Wealth Wizards,** *Chief Strategy Officer*
- **Wealthcare Limited,** *Managing Director*
- **Western Financial Planning Ltd,** *Director*
- **Westminster Wealth Management LLP,** *Compliance Officer*
- **Whateley Wealth Management Limited,** *Director*
- **Whitebeam Independent Financial Advice Ltd,** *Independent Financial Adviser*
- **Wise Investment,** *Chief Executive Officer*
- **Wise Investment,** *Chief Client Officer*
- **WKM Wealth Ltd,** *Director*
- **WTW Investments Wealth Solutions,** *Director, Investments*
- **WTW Investments Wealth Solutions,** *Senior Director, Investments*
- **Your Future Your Money Limited,** *Managing Director*
- **Zedra,** *Business Development Manager*

Sponsors & Experts

- **Aberdeen,** *Business Development Manager*
- **Aberdeen,**
- **Abstract UK,** *CEO*
- **AdvisoryAI,** *Senior Manager*
- **AdvisoryAI,** *Co-founder & CEO*
- **AdvisoryAI,** *Account Manager*
- **AdvisoryAI,** *Senior Manager*
- **Aegon UK,** *Regional Account Manager*
- **Aegon UK,** *Key Account Director*
- **AJ Bell,** *Senior Technical Consultant*
- **AJ Bell,** *Head of Platform Marketing*
- **AJ Bell,** *Investments Business Development Manager*
- **AJ Bell,** *Senior Events Manager*
- **AJ Bell,** *Business Development Consultant*
- **AJ Bell,** *Business Development Manager*
- **Alpha Beta Partners,** *Chief Executive*
- **Alpha Beta Partners,** *Director Sales*
- **Aviva,** *Strategic Account Manager*
- **Aviva,** *Head of Strategic Partnerships*

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Sponsors & Experts

- **Aviva,** *Head of Strategic Partnerships*
- **Aviva Investors,** *Strategic Partners Director*
- **Aviva Investors,** *Strategic Partnerships Director*
- **Befree Ltd,** *Head of Operations*
- **Befree Ltd,** *Business Development Manager*
- **Befree Ltd,** *Partner*
- **Benchmark Capital,** *Senior Business Development Consultant*
- **Benchmark Capital,** *Senior Business Development Consultant*
- **Benchmark Capital,** *Head of Digital Strategy & Transformation*
- **Benchmark Capital,** *Head of Business Development*
- **Blackfinch,** *Strategic Distribution Director*
- **Blackfinch,** *Executive Business Development Manager*
- **Blackfinch,** *Co-Founder of Lawdable and Wenup*
- **BNY Investments,** *Head of UK Segment Marketing International*
- **BNY Investments,** *Business Development Manager*
- **BNY Investments,** *Partnerships & Regional Investment Director*
- **C Hoare & Co,** *Partner & Head of Philanthropy*
- **Canaccord Wealth,** *Business Development Director*
- **Canaccord Wealth,** *Chief Distribution Officer*
- **Canaccord Wealth,** *Business Development Director*
- **Catalyst Partners,** *Partner*
- **Catalyst Partners,** *Partner*
- **Catalyst Partners,** *Consultant*
- **Cazenove Capital,** *Portfolio Director*
- **CIL Management Consultants,** *Senior Partner*
- **Consumer Duty Alliance,** *Chief Executive Officer*
- **Consumer Duty Alliance,** *Head of Engagement*
- **Consumer Duty Alliance,** *Marketing Executive*
- **Defaqto Ltd.,** *Head of Investment & Protection*
- **Defaqto Ltd.,** *Head of New Business Sales*
- **Defaqto Ltd.,** *Senior Business Development Manager*
- **Defaqto Ltd.,** *Business Development Manager*
- **Defaqto Ltd.,** *Business Development Manager*
- **Defaqto Ltd.,** *Business Development Manager*
- **Defaqto Ltd.,** *Head of Customer Success*
- **DWF Law,** *Head of Wealth Management Regulatory*
- **Dynamic Planner,** *Senior Solutions Consultant*
- **Dynamic Planner,** *Senior Business Development Executive*
- **Dynamic Planner,** *Corporate Sales Leader*
- **Dynamic Planner,** *Principal Solutions Consultant*
- **Dynamic Planner,** *Investment Services Development Director*
- **Dynamic Planner,** *Business Development Director*
- **Dynamic Planner,** *Business development Consultant*
- **Echobliss Sound Therapy Ltd,** *Founder*
- **Estelle Health and Wealth,** *Co-founder*
- **Financial Conduct Authority,** *Senior Associate*
- **Financial Conduct Authority,** *Manager - Consumer Investments*
- **Financial Conduct Authority,** *Senior Associate*
- **Financial Conduct Authority,** *Senior Associate*
- **Financial Conduct Authority,** *Senior Associate*
- **Fintel Services,** *Senior Product Manager*
- **FoxTech Cyber,** *Solutions Development Representative*
- **FoxTech Cyber,** *Chief Technology Officer*
- **FoxTech Cyber,** *CEO*

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Sponsors & Experts

- **FoxTech Cyber,** *Cyber Security Analyst*
- **Fundhouse,** *Business Development Manager*
- **Fundhouse,** *Business Development Manager*
- **Fundhouse,** *Head of Business Development*
- **Fundhouse,** *Investment Analyst*
- **Fundhouse,** *Investment Analyst*
- **Fundhouse,** *Partner, Marsh People and Investments*
- **Funkled,** *Founder*
- **H&Z Consulting Ltd,** *Consultant*
- **INGENIOUS,** *Head of Business Development*
- **Invesco,** *Director- Events, EMEA*
- **Invesco,** *Head of UK & Northern Europe Distribution*
- **Invesco,** *Regional Account Manager*
- **Invesco,** *Head of Client Investment Solutions, EMEA*
- **Invesco,** *Senior Marketing Manager- Advisory, EMEA*
- **Invesco,** *Head of UK Wholesale*
- **Invesco,** *Head of Regional Client Directors*
- **Invesco,** *Portfolio Manager*
- **Invesco,** *Head of Regional Account Managers*
- **Invesco,** *Strategic Partnerships Director*
- **Invesco,** *Marketing Director- Advisory, EMEA*
- **Invesco,** *Client Director*
- **Invesco,** *Regional Client Director*
- **Invesco,** *Events Administrator/Co-ordinator*
- **Jigsaw Tree Limited,** *Proposition and Commercial Director*
- **Jowita Penkala,** *Founder, Breaking Limits, Transforming Lives & Workplaces*
- **Just,** *Director of Retail Business Development*
- **Lifetime Financial Management,** *Digital Producer*
- **Lifetime Financial Management,** *Group Operations Director*
- **Lifetime Financial Management,** *Group Marketing Director*
- **Lifetime Financial Management,** *Operations Director*
- **M&G Wealth,** *Head of Partnerships and Specialists*
- **M&G Wealth,** *National Accounts Director*
- **M&G Wealth,** *Specialist*
- **M&G Wealth,** *Key Account Director*
- **M&G Wealth,** *Events Manager*
- **Melia Consulting,** *Relationship Manager*
- **Mercer,** *Principal, UK Investments*
- **Milliman UK,** *Principal*
- **Milliman UK,** *Principal and Director of European Trading*
- **Milliman UK,** *Head of UK Advisory Services*
- **Milliman UK,** *Sales Manager*
- **Moneyinfo,** *Business Development Executive*
- **Moneyinfo,** *Client Growth Manager*
- **Nucleus,** *Head of Events*
- **Nucleus,** *Senior Business Development Manager*
- **Nucleus,** *Business Development Director*
- **Nucleus,** *Technical Services Director*
- **Obsidian Technologies Ltd,** *VP of Sales*
- **Obsidian Technologies Ltd,** *VP of Sales*
- **Obsidian Technologies Ltd,** *Head of Compliance*
- **Obsidian Technologies Ltd,** *CEO*
- **Pacific Asset Management,** *Head of Multi Asset Solutions*
- **Pacific Asset Management,** *Partner, Multi Asset Solutions*

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Sponsors & Experts

- **Pacific Asset Management,** *Sales support*
- **Pacific Asset Management,** *Director, Multi-Asset Solutions*
- **Pacific Asset Management,** *Head of Client Engagement, Multi-Asset Solutions*
- **Pacific Asset Management,** *Senior Sales Support, Client Engagement*
- **Pacific Asset Management,** *Director, Multi-Asset Solutions*
- **Pathfinder CIC,** *Founder*
- **Philanthropy Impact,** *Communications and Events Officer*
- **Plannr,** *Director*
- **Plus Group,** *Director & Co-Founder*
- **Premier Miton,** *Strategic Partnerships Director*
- **Premier Miton,** *Business Development Executive*
- **Puma Investments,** *Senior Business Development Manager*
- **Puma Investments,** *Strategic Partnerships Manager*
- **Puma Investments,** *Head of Strategic Partnerships*
- **Puma Investments,** *Strategic Partnerships Manager*
- **RBC Brewin Dolphin Limited,** *Portfolio Manager / Alternatives Specialist*
- **RBC Brewin Dolphin Limited,** *Head of National, Network & International Distribution*
- **RBC Brewin Dolphin Limited,** *Regional Manager*
- **SBR Consulting,** *Management Consultant*
- **Schroders Plc,** *Marketing Executive*
- **Schroders Plc,** *Head of Regional Sales South, Wealth*
- **Schroders Plc,** *Business Development Executive*
- **Scottish Widows,** *Strategic Partnership Director*
- **Scottish Widows,** *Strategic Development Director*
- **Scottish Widows,** *Strategic Partnerships Director*
- **Scottish Widows,** *Business Development Manager*
- **SEI,** *Head of International Marketing*
- **SEI,** *Business Development Associate*
- **SEI,** *Managing Director, Head of Client Solutions*
- **SEI,** *Head of UK Sales, PB and WM*
- **SEI,** *Sales Associate*
- **SEI,** *Sales Director*
- **SS&C Advent,** *EMEA Sales Manager*
- **SS&C GIDS (Global Investor and Distribution Solutions),** *Digital Transformation Lead*
- **Standard Life,** *Account Manager*
- **Standard Life,** *Senior Investment Development Manager*
- **Standard Life,** *Business Development Manager*
- **Standard Life,** *Head of Strategic Partnerships*
- **Tammy Clarke,** *Yoga practitioner*
- **The Ingenious Group,** *Business Development Manager*
- **The Ingenious Group,** *Business Development Manager*
- **The Workplace Happiness Expert,** *Founder*
- **The Workplace Sleep Coach,** *The Workplace Sleep Coach*
- **threesixty services LLP,** *Chief Executive Officer*
- **threesixty services LLP,** *Head of Advisory Sales*
- **threesixty services LLP,** *Account Manager*
- **TIME Investments,** *Business Development Manager*
- **TIME Investments,** *Strategic Partnerships Manager*
- **TIME Investments,** *Regional Business Development Manager*
- **TIME Investments,** *Head of Internal Sales*
- **Unbiased,** *Enterprise Account manager*
- **Unbiased,** *Senior Sales Manager*
- **Unbiased,** *Managing Director*
- **Unbiased,** *Enterprise Sales Manager*

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Sponsors & Experts

- **Unbiased,** *Business Development Manager*
- **Unbiased,** *Enterprise Sales Manager*
- **Woven Advice,** *Co-Founder*

Facilitators & Speakers

- **Adeptli,** *Co-Founder*
- **AheadMG,** *Wealth & Partnerships Director*
- **Albert E Sharp LLP,** *Investment Manager*
- **AlboC,** *Chief Sales Officer*
- **Alpha FMC,** *Director*
- **Catalyst Partners,** *Director*
- **Deceased,** *Founder*
- **evolve.,** *Founder*
- **Financial Conduct Authority,** *Interim Head of Department for Market*
- **Focaldata,** *Business Development Director*
- **Fundhouse,** *Founder and Chief Investment Officer*
- **Invesco,** *Head of Market Insights*
- **Keynote Speaker,** *Former Chief Executive Officer at Sainsbury's*
- **Keynote Speaker,** *English commentator and a former cricketer*
- **Melo,** *Chief Innovation Officer*
- **Melo (Change Squared/Exit Partnership/Aspire Exec Merged),** *Chief Operating Officer*
- **Mint Blue Consulting Ltd,** *Owner and Director*
- **Ocorian (UK) Limited,** *Consulting Lead*
- **Origo Services Limited,** *Head Of Market Development*
- **Owen James Events,** *Managing Director*
- **Philanthropy Impact,** *Chief Executive Officer*
- **Pillar Client Services,** *Founder*
- **Pivot Strategies Ltd,** *Co-Founder*
- **Pivot Strategies Ltd,** *Managing Director*
- **SOAP,** *Founder & Principal Consultant*

Industry Bodies, Regulators, Associations & Guests

- **Alvarez & Marsal FS Europe Limited,** *Senior Director*
- **Balanced Hiring,** *Founder & Director*
- **Calculus Capital Limited,** *Director*
- **Chartered Institute for Securities & Investment,** *Head of UK Client Relationships*
- **Davies Group Limited (Sionic),** *Principal Consultant*
- **Defaqto Ltd.,** *Business Development Manager*
- **Estelle Health and Wealth,** *Co-founder*
- **Estelle Health and Wealth,** *CMO*
- **Fintel,** *Director of Business Growth and Succession*
- **Fintel,** *Chief Marketing Offier*
- **Fintel Services,** *IT Director*
- **FS Legal,** *Partner*
- **Graphene,** *Corporate Development Director*
- **Independent Consultant,** *PR Consultant*
- **Independent Consultant,** *Was Head of Client Solutions Group @ Kleinwort Hambros*
- **Independent Consultant,** *Director & Independent Financial Planner*
- **Just,** *Director of Retail Distribution*

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Industry Bodies, Regulators, Associations & Guests

- **Just,** *Integrated Distribution Director*
- **Just,** *National Accounts Director*
- **MODDEKO PTY. LTD. (5 ELK),** *Business Development Manager*
- **MODDEKO PTY. LTD. (5 ELK),** *CEO & Founder*
- **MODDEKO PTY. LTD. (5 ELK),** *Client Experience Manager*
- **Origo Services Limited,** *FinTech Adoption Specialist*
- **Pillar Client Services,** *Chief Commercial Officer*
- **Prism the Gift Fund,** *Business Development Executive*
- **SBR Consulting,** *Principal Consultant*
- **Simplybiz Ltd,** *Compliance Director*
- **Simplybiz Ltd,** *Chief Executive Officer*
- **SimplyBiz Mortgages,** *Head of Lender Relationships*
- **Solve Partners,** *Principal Consultant*
- **Solve Partners,** *Director*
- **SS&C Advent,** *Lead Field Sales Executive*
- **Stewardship,** *Growth & Relationships Manager*
- **The London Foundation for Banking & Finance,** *Chief Executive*

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