

Sponsors



Participant List

BUSINESS STRATEGY

- **Advanta Wealth Ltd**, *Chief Commercial Officer*
- **Aviva**, *Head of Adviser Platform*
- **Beckett Investment Management**, *Chairman*
- **Blevins Franks Financial Management Limited**, *Head of Wealth Structuring*
- **Charles Stanley Plc**, *Head of Asset Management*
- **Charles Stanley Plc**, *Managing Director - Charles Stanley Central Financial Services*
- **Clifton Asset Management PLC**, *Director*
- **Colmore Partners**, *Financial Planning Director*
- **Colmore Partners**, *Managing Director*
- **Continuum (Financial Services) LLP**, *Managing Partner*
- **Defaqto Ltd.**, *Chief Executive Officer*
- **Defaqto Ltd.**, *Principal Insight Consultant (Funds & DFM)*
- **Foster Denovo**, *Chief Executive Officer*
- **HFMC Wealth Partners LLP**, *Chief Operating Officer*
- **Helm Godfrey Partners Ltd**, *Chairman of the Board*
- **Helm Godfrey Partners Ltd**, *Managing Director and CEO*
- **Loyal North**, *Acquisitions Director*

- **M&G Wealth Advice**, *Managing Director - M&G Wealth Advice Partnership*
- **Mattioli Woods Plc**, *Business Development Director*
- **Origen Financial Services**, *Head of Private Client*
- **Parmenion Capital Partners LLP**, *Chief Commercial Officer*
- **Pi Financial Ltd**, *Business and Development Director*
- **Pi Financial Ltd**, *Chief Executive Officer*
- **RSMR**, *Co Founder & NED*
- **Rathbones Group Plc**, *Head of Distribution – Rathbones Financial Planning*
- **Sesame Bankhall Group**, *Executive Chairman*
- **Threesixty services LLP**, *Chief Executive Officer*
- **Timothy James and Partners Ltd**, *Director*
- **Tribe Impact Capital LLP**, *Partner*
- **Validpath Ltd**, *Commercial Director*
- **Willis Owen Limited**, *Managing Director*

INVESTMENT

- **AFH Wealth Management**, *Chief Advice Officer*
- **Argentis Financial Planning Ltd**, *Head of Client and Proposition*
- **Ascot Lloyd**, *Head of Investment Operations*
- **Atomos (previously Sanlam Wealth)**, *Head of Wealth Planning*
- **Evelyn Partners**, *Head of IFA Integration*
- **Fidelius**, *Director of Corporate Development*
- **HSBC Global Asset Management (UK) Limited**, *Head of Fintech, Venture & Growth Investments, HSBC Asset Management*
- **Independent**, *Managing Director - Financial Planning*
- **Independent**, *Project Director*
- **M&G Wealth Advice**, *Business Development Director*
- **Mazars Financial Planning Limited**, *Head of People & Development*
- **One Four Nine Group**, *Chief Investment Officer*
- **Openwork Limited**, *Wealth Proposition Director*
- **Origen Financial Services**, *Director, Proposition and Marketing*
- **Quilter Financial Planning**, *Managing Director of Quilter Financial Advisers, National Advice Business*
- **Sesame Bankhall Group**, *Group Propositions Director*
- **St. James's Place Wealth Management Group**, *Commercial Director*
- **The Fry Group**, *UK Financial Planning Manager*
- **The Private Office**, *Snr Partner*

SPONSORS & EXPERTS

- **Aviva Investors**, *ESG Strategy Director*
- **Aviva Investors**, *Strategic Accounts Manager*
- **Charles Stanley Plc**, *Group Head of Sales*
- **Charles Stanley Plc**, *Group Head of Sales*
- **Charles Stanley Plc**, *Head of Strategic Partnerships*
- **Dimensional Fund Advisors Ltd**, *Co-Head of Global Client Group & Vice President*
- **Dimensional Fund Advisors Ltd**, *Head of Wealth Management Group, UK & Vice President*
- **Dimensional Fund Advisors Ltd**, *Regional Director*
- **Fidelity International**, *Conquest Planning Business Development Manager*
- **Fidelity International**, *European Product Development Director*
- **Fidelity International**, *Head of Strategic Accounts*
- **Fidelity International**
- **GSAM**, *Global Head, Business Strategy, Strategic Advisory Solutions*
- **GSAM**, *Head of Strategic Partners, UK & Ireland Retail Client Business*
- **GSAM**, *Head of UK & Ireland Retail Client Business*
- **Hymans Robertson Investment Services**, *Head of Key Accounts*
- **Nucleus**, *Director of Data Solutions*
- **Nucleus**, *Director of Key Accounts*
- **Ruffer LLP**, *Business Development Director*
- **Ruffer LLP**, *Investment Director*
- **Schroders Plc**, *Head of UK Intermediary Solutions*
- **Schroders Plc**, *Head of UK Intermediary*
- **Vanguard**, *Strategic Account Manager*

FACILITATORS & SPEAKERS

- **Academy of Ideas**, *Director*
- **Catalyst Partners**, *Director*
- **Change Squared Ltd**, *Director of Progress*
- **Guardian News And Media**, *Political Editor*
- **JoyndUp Ltd**, *Director*
- **Mint Blue Consulting Ltd**, *Owner and Director*
- **Nastaran Tavakoli-Far**, *Journalist and Radio Host*
- **Owen James Events**, *Managing Director*
- **Savanta**, *Director, Client Development*

- **Silverback Consultancy**, *Founder*
- **Wild Ochre Consulting**, *Founder*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Financial Vulnerability Taskforce**, *Chief Executive Officer*
- **Jigsaw Compliance Services**, *Compliance Consultant*
- **PFS (Personal Finance Society)**, *Interim Chief Executive Officer*