

Sponsors



Participant List

BUSINESS STRATEGY

- **2 Plan Wealth Management**, *Managing Director*
- **Absolute Financial Management**, *Managing Director*
- **Argentis Financial Planning**, *Head of Financial Advice*
- **Blevins Franks Financial Management**, *Head of Wealth Structuring*
- **Charles Stanley & Co**, *Director of CSD Advice and Guidance*
- **Charles Stanley & Co**, *Head of Asset Management*
- **Charles Stanley & Co**, *Managing Director - Charles Stanley Central Financial Services & Chief Client Officer*
- **Clifton Asset Management**, *Managing Director*
- **Colmore Partners**, *Financial Planning Director*
- **Colmore Partners**, *Managing Director*
- **Connor Broadley**, *Co-Founder & Director*
- **Corbel Partners**, *Non-Executive Director*
- **JustFA**, *Chief Executive Officer*
- **Loyal North**, *Acquisitions Director*
- **MKC Wealth**, *Chief Technology Officer*
- **MKC Wealth**, *Head of M&A*
- **Mattioli Woods**, *Strategic Partnerships Director*
- **Paradigm Norton Financial Planning**, *Chief Executive Officer*
- **Parmenion Capital Partners**, *Chief Commercial Officer*

- **Parmenion Capital Partners**, *Commercial Director*
- **Pi Financial**, *Business and Development Director*
- **Platforum**, *Head of Editorial Strategy*
- **Quai Digital**, *Non-Executive Director*
- **Quilter**, *Commercial Director*
- **RBC Brewin Dolphin**, *Senior Director Client Advice UK*
- **RSQ Wealth Management**, *Managing Director*
- **Shackleton Advisers**, *Head of Growth*
- **Simplybiz**, *Chief Executive Officer*
- **Stonewood Wealth Management**, *Group CEO*
- **Succession Advisory Services**, *Managing Director*
- **Tavistock Investments**, *Corporate Development Director*
- **The Private Office**, *Chief Executive Officer*
- **The Private Office**, *Chief Marketing Officer*
- **Unique Financial Planning**, *Chief Executive Officer*
- **Wealth Wizards**, *Head of Personal Advice*

INVESTMENT

- **Benchmark Capital**, *Head of Financial Planning*
- **Broadstone**, *Investment Director*
- **Magus Private Wealth**, *Chief Executive Officer and Chief Investment Officer*
- **Purposeful Group**, *Chief Client Officer*
- **Quilter Financial Planning**, *Managing Director of Quilter Financial Advisers, National Advice Business*
- **Quilter Financial Services**, *Head of Adviser & Client Support*
- **Raymond James Investment Services**, *Director of Wealth Management Services – Proposition & Development*
- **Saltus Partners**, *Partner, M&A*
- **St. James's Place Wealth Management Group**, *Establishment Commercial Director*
- **The Private Office**, *Senior Partner & Financial Planner*
- **Tribe Impact Capital**, *Partner*
- **Validpath**, *Succession Director*
- **Wren Sterling**, *Head of Proposition & Commercial*

FACILITATORS & SPEAKERS

- **55/Redefined**, *Founder and CEO*
- **Financial Conduct Authority**, *Head of Department (Advisers, Wealth and Pensions)*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **FoxTech Cyber**, *Managing Director*
- **Platforum**, *Associate Research Director*
- **Platforum**, *Head of Platforum*
- **SBR Consulting**, *Management Consultant*
- **UK Community Foundations**, *CEO*