

a meeting of MINDS



A Meeting of Minds - Advisory Distributor June 2026

Thursday 25 June 2026, Tylney Hall Hotel & Gardens, Ridge Lane, Hook, RG27 9AZ

Sponsors



Participant List

- **Argentis Financial Planning Ltd**, *Head of Financial Advice*
- **Argentis Financial Planning Ltd**, *Chief Commercial Officer*
- **Blevins Franks Financial Management Limited**, *Head of Wealth Structuring*
- **Blevins Franks Financial Management Limited**, *Head of Strategic Partnerships*
- **Clifton Asset Management PLC**, *Managing Director*
- **Colmore Partners**, *Financial Planning Director*
- **Hummingbird Family Ventures**, *Director*
- **In Partnership Financial Advisers Limited**, *Chief Executive Officer*
- **Mattioli Woods Plc**, *Managing Director - Business Development & Marketing*
- **MWA Financial**, *Head of Compliance*
- **Origen Financial Services**, *Director, Proposition and Marketing*
- **Parmenion Capital Partners LLP**, *Intermediary Distribution Director*
- **Perspective Financial Group Limited**, *Group Acquisitions Director*
- **Pi Financial Ltd**, *Chief Executive Officer*
- **Platforum**, *Head of Editorial Strategy*
- **Quai Digital**, *Non-Executive Director*
- **Quilter Financial Services Ltd**, *Head of Adviser & Client Support*
- **Quilter plc**, *Commercial Director*
- **Raymond James Investment Services Ltd**, *Director of Wealth Management Services – Proposition & Development*
- **Shackleton Group**, *Group Compliance Director*
- **Strategic Solutions Financial Services**, *Partner & Chartered Financial Planner*
- **Tavistock Investments Plc**, *Corporate Development Director*
- **The Private Office**, *Snr Partner & Financial Planner*
- **threesixty services LLP**, *Chief Executive Officer*
- **Validpath Ltd**, *Succession Director*
- **Validpath Ltd**, *Proposition Director*
- **Wealth Wizards**, *Head of Personal Advice*
- **Willis Owen Limited**, *Managing Director*

Industry Bodies, Regulators, Associations & Guests

- **RSMR**, *Director*
- **Simplybiz Ltd**, *Chief Executive Officer*

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