

A Meeting of Minds - Gatekeepers October 2025
Thursday 16 October 2025, The Berkeley Hotel, Wilton Place, Knightsbridge, London, SW1X 7RL

Sponsors



RATHBONES



Participant List

- **AJ Bell**, *Head of Investment Research*
- **Alder Investment Management**, *Chief Investment Officer*
- **Alpha Investment Office**, *Founder and Managing Director*
- **Atomos Investments**, *Head of portfolio management*
- **Atomos**, *Head of High Net Worth*
- **Cavendish Ware**, *CIO & Head of Investment*
- **Charles Stanley & Co**, *Head of Asset Management*
- **Clifton Asset Management**, *Managing Director*
- **Copia Capital Management**, *Senior Portfolio Manager*
- **Credo**, *Chief Investment Officer*
- **Defaqto**, *Head of Investment & Protection*
- **Defaqto**, *Insight & Consulting Director*
- **EQ Investors**, *Head of Fund Research*
- **Fintel**, *Head of Investment Management Compliance SimplyBiz DFM*
- **Hay Hill Wealth Management**, *Chief Investment Officer*
- **IWP Investment Management**, *Interim Chief Executive*
- **J. Stern & Co**, *Investment Specialist and Client Director*
- **Lincoln Private Investment Office**, *Portfolio Manager*
- **MI Capital Research**, *Head of Research*
- **Morningstar Investment Management Europe**, *Senior Portfolio Manager*
- **Parmenion Capital Partners**, *Head of Investments and CIO*

- **Peregrine & Black Investment Management**, *Chief Executive Officer*
- **Quilter Financial Planning**, *Managing Director of Quilter Financial Advisers, National Advice Business*
- **SG Kleinwort Hambros Bank**, *Head of Portfolio Construction*
- **Square Mile Investment Services**, *Associate Director - Responsible Investment*
- **The Private Investment Office**, *Chief Investment Officer*
- **TrinityBridge**, *Senior investment manager,*
- **Wren Sterling Financial Planning**, *Head of Research*
- **Wren Sterling**, *Head of Proposition & Commercial*
- **Wren Sterling**, *Proposition Specialist*

FACILITATORS & SPEAKERS

- **Asset Risk Consultants**, *Managing Director*
- **Keynote Speaker**, *Author of High Risk: A True Story of the SAS, Drugs and Other Bad Behaviour*