

a meeting of MINDS



A Meeting of Minds - Gatekeepers March 2026

Thursday 12 March 2026, The Berkeley Hotel, Wilton Place, Knightsbridge, London, SW1X 7RL

Sponsors



Participant List

- **AJ Bell, Head of Investment Research**
- **Alpha Investment Office, Founder and Managing Director**
- **Atomos, Wealth Consultant**
- **Atomos, Head of portfolio management**
- **Bowmore Asset Management, Research Analyst**
- **BRI Wealth Management PLC, Head of Investment**
- **Cavendish Ware Limited, CIO & Head of Investment**
- **Cazenove Capital, Portfolio Director**
- **Charles Stanley & Co Ltd, Head of Asset Management**
- **City Asset Management Plc, Chief Investment Officer**
- **Copia Capital Management, Senior Portfolio Manager**
- **Credo, Chief Investment Officer**
- **EQ Investors Limited, Head of Fund Research**
- **Frank Investments Limited, Chief Investment Officer**
- **IBOSS Asset Management Limited (acquired by Kingswood), Chief Investment Officer**
- **IWP Investment Management, Interim Chief Executive**
- **MetaWealth, Manager**
- **MI Capital Research Limited A/R Defaqto, Head of Research**
- **Parmenion Capital Partners LLP, Head of Investments and CIO**
- **Peregrine & Black Investment Management Ltd, Chief Executive Officer**
- **Quilter plc, Investor**
- **Quilter plc, Operations Director**
- **Sentinel Portfolio Management Limited, Chief investment officer**
- **The Private Investment Office, Chief Investment Officer**
- **Tribe Impact Capital LLP, Partner**
- **Tribe Impact Capital LLP, Chief Investment Officer**
- **Unbiased Financial Group LLP, Chartered Wealth Manager**

This list is copyright of the Owen James Group and its contents must be kept confidential and may not be passed to any third party for any purpose