

a meeting of MINDS



A Meeting of Minds - Wealth Management & Private Banking June 202*

Thursday 12 June 2025, The Berkeley Hotel, Wilton Place, Knightsbridge, London, SW1X 7RL

Sponsors



Participant List

- **Affinity Private Wealth, Chief Executive Officer**
- **AITi Tiedemann Global, Chief Operating Officer**
- **Beaucherc Advisory Services Ltd, Executive Partner**
- **Beaucherc Advisory Services Ltd, Co-Founder, Managing Director**
- **C Hoare & Co, Head of Private Banking**
- **Connor Broadley Ltd, Co-Founder & Director**
- **Connor Broadley Ltd, CEO & Co-Founder**
- **Credo, Chief Executive Officer**
- **Credo, Chairman**
- **Credo, Director and Head: Private Clients**
- **EQ Investors Limited, Joint CEO & Head of Financial Planning**
- **Hassium Asset Management LLP, Managing Director**
- **Hay Hill Wealth Management, Chief Investment Officer**
- **Isio Wealth Planning, Head of Wealth**
- **J. Stern & Co LLP, Client Director**
- **James Hambro & Partners LLP, Chief Operating Officer**
- **Killik & Co, Managing Partner**
- **Lincoln Private Investment Office, Chief Investment Officer**
- **Moneycorp Bank Limited, Global Head Of Private Banking**
- **Purposeful Group (formerly Finitor Wealth), Chairman**
- **Quilter Financial Planning, Managing Director of Quilter Financial Advisers, National Advice Business**
- **RBC Brewin Dolphin Limited, Strategic Business Director**
- **RBC Wealth Management (Royal Bank of Canada), Head of Credit & Banking**
- **Rothschild & Co, Non Executive Director**
- **Sarasin & Partners LLP, COO, Client Affairs**
- **Six Degrees Wealth Limited, Co-Founder**
- **St. James's Place Wealth Management Plc, Director of Advice Support**
- **Standard Chartered Bank, Executive Director**
- **Tyndall Investment Management, Director, Private Clients**
- **UBS Wealth Management UK, Executive Director**
- **Wimmer Finance Ltd, Chief Executive Officer**

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