

Sponsors



Participant List

- **1st Financial Foundations** - Yash Tosar, *Director*
- **3difs Ltd** - Jon Isaacs, *Managing Director*
- **A J Wealth Management Ltd** - Alexandros Mitios, *Investment Director*
- **A J Wealth Management Ltd** - Angela Jellings, *Managing Director*
- **Abram Partnership Ltd** - Ken Abram, *Director/Head of Financial Advice*
- **Access Wealth Management** - James Clancy, *Partner*
- **Adler Financial Planning Ltd** - Stuart Burkin, *Director and IFA*
- **Advisa Group** - Trevor Griggs, *Director*
- **Aim Independent Ltd** - Phil Watson, *Managing Director*
- **Alan Boswell & Co Ltd** - John Whitehead, *Director*
- **Appleton Gerrard Private Wealth Management** - Kusal Ariyawansa, *Principal and Chartered Financial Planner*
- **Applewood Independent Limited** - David Pritchard, *Managing Director*
- **Beaufort Asset Management** - Clive Goldthorpe, *Director*
- **Black Swan Capital Ltd** - Paul Hutton, *Managing Director*
- **Bluesky Independent Financial Advisers LLP** - Mark Penston, *Director and Chartered Financial Planner*
- **Burlington Associates Ltd** - Mandeep Panesar, *Managing Director*

- **Chiltern Consultancy Ltd** - Frank Thompson, *Managing Director*
- **Chiltern Consultancy Ltd** - Mike Foster, *CEO*
- **Chiltern Consultancy Ltd** - Shaun Clarke, *Business Development Director*
- **Chris Leach & Associates Ltd** - Chris Leach, *Managing Director*
- **Clark Gillone** - David Van Der Hoeven, *Director*
- **Clarkson Wayman Ball Ltd** - Simon Cogman-Hellier, *Group Managing Director*
- **Clifton Asset Management PLC** - Anthony Carty, *Group Financial Planning & Business Development Director*
- **Elevation Investment Management** - Tony Smith, *Group Managing Director*
- **Ellis Bates Financial Solutions LTD** - Michael Cope, *Managing Director*
- **Fensham Howes Ltd** - Giles Pidcock, *Director and Co-Founder*
- **Fingerprint Financial Planning** - Paul Spencer-Nixon, *Financial Planner & Principal Partner*
- **Flowers McEwan Limited** - Murray McEwan, *Director*
- **Francis Clark Financial Planning Ltd** - Andy Hammond, *Managing Director*
- **Generation Financial Services Ltd** - Andrew Waller, *Director*
- **Gerrard Stuart Financial Services Limited** - Andrew Pitman, *Director*
- **Grosvenor Corlett Bird Ltd - AR of TenetConnect Services** - Paul Bird, *Director*
- **Hearnden Associates Limited** - Catherine Hearnden, *Director*
- **Holden & Partners LLP** - Steven Pyne, *Partner*
- **Investment Quorum Ltd** - Petronella West, *Chief Executive Officer*
- **Investment Solutions Wealth Management Ltd** - David Connor, *Director*
- **James Young Associates Ltd** - Samantha Mitchell, *Director & Independent Advanced Financial Advisor*
- **Joseph Lamb** - Martin Lamb, *Chief Executive Officer*
- **Just Wealth (part of Just Mortgages)** - David Magee, *Wealth Distribution Director*
- **Kensingtons Asset Management Ltd** - Stephen Roach, *Managing Director*
- **King Financial Planning - AR of Tavistock** - James King, *Managing Partner*
- **Lacomplc** - Peter Buxtorf, *Managing Director*
- **Lycetts Financial Services Ltd** - Nick Straker, *Director of Financial Services*
- **Lynas Vokes Investments Ltd** - Jamie Gordon, *Managing Director*
- **Makemsons Independent Financial Advice** - Gareth Makemson, *Co-Director*
- **Margetts Wealth Management Ltd** - Kevin Smith, *Managing Director*
- **Matthew Douglas Ltd** - Russell Brett, *Director*
- **Montague Wealth Management Ltd** - Peter Grant, *Director*
- **Nicholls Stevens Financial Services** - Carole Nicholls, *Managing Director*
- **Octagon Financial Services Limited** - Adrian Hill, *Director*
- **Parkgate FS LLP** - Steve Braidford, *Managing Partner*

- **Paul Young IFA** - Andrew Gardner, *Partner*
- **Paul Young IFA** - Paul Young, *Managing Director*
- **Pen-Life Associates Ltd** - Bernadette Render, *Practice Manager*
- **Pharon Independent Financial Advisers Ltd** - Nicholas O'Shea, *Director*
- **Phillip Bates & Co Financial Services** - Alan Mellor, *Managing Director*
- **Prismatic Wealth Limited** - Graham Laverick, *Managing Director*
- **Prosperity Financial Services Ltd** - Chris Mison, *Director and Chartered Financial Planner*
- **SFIA Group Ltd** - Chris Procter, *Managing Director*
- **Sanlam UK** - Paul Clifford, *Portfolio Manager*
- **The Premier Partnership Limited** - Nigel Herrick, *Director*
- **The Wealth Management Group LLP** - Russell Bavinton, *Managing Partner*
- **True Bearing Ltd** - Helen Lupton, *Compliance and Board Director*
- **Warwick Financial Solutions Limited** - Greg Jones, *Managing Director*
- **Whateley Wealth Management Ltd** - Nicola Whateley, *Director*
- **Wingate Financial Planning** - Alistair Cunningham, *Chartered Financial Planner*

SPONSORS & EXPERTS

- **Benchmark Capital** - Keith Hare, *Corporate Development Director*
- **Carmignac** - David Beacham, *Business Development Director, Head of Regional Sales*
- **Carmignac** - Justin Kew, *ESG Analyst*
- **Dynamic Planner** - Yasmina Siadatan, *Creative - Head of Marketing*
- **Hymans Robertson Financial Services LLP** - John Pyburn, *Director of Wealth*
- **NS&I** - Andrew Pike, *Head of Intermediary Relationships*
- **NS&I** - Madalina Oros, *Senior Intermediary Marketing Manager*
- **Quilter plc** - Darren Wardman, *Business Development Manager - North*
- **Quilter plc** - Scott Harrison, *Regional Manager - North*

FACILITATORS & SPEAKERS

- **Deloitte** - James Alexander, *Director - UK Wealth and Asset Management*
- **Esperto Business Solutions** - Dave Edwards, *Founder*
- **Orion Consultancy Limited** - John Chapman, *Consultant*
- **Phase 2 Consulting** - Martyn Laverick, *Managing Director*
- **Rennison Consulting Ltd** - Roderic Rennison, *Director*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Quilter plc** - Edward Peck, *Regional Manager - London / South East*

