

Sponsors



Participant List

- **ALKA Financial Services** - Kailesh Patel, *Director*
- **Advisa Group** - Paul Hamer, *Director*
- **Advisa Group** - Trevor Griggs, *Director*
- **Alan Boswell & Co Ltd** - John Whitehead, *Director*
- **Atwoods Ltd** - Adrian Ringrose, *Managing Director*
- **Birchwood Investment Management Ltd** - Trevor Simms, *Chairman*
- **Black Swan Capital Ltd** - Paul Hutton, *Managing Director*
- **Blackstone Moregate Ltd** - Richard Hopkins, *Director*
- **Bournemouth Investments Ltd** - Steve Chislett, *Director*
- **Broom Consultants Ltd** - Jeff Watson, *Director*
- **Broom Consultants Ltd** - John Broom, *Managing Director*
- **Burlington Associates Ltd** - Mandeep Panesar, *Managing Director*
- **Cavendish Ware Wealth Management & Financial Planning** - Adrian Ware, *Chief Executive Officer*
- **Chiltern Consultancy Ltd** - Frank Thompson, *Managing Director*
- **Chiltern Consultancy Ltd** - Mike Foster, *Chief Executive Officer*
- **Chiltern Consultancy Ltd** - Shaun Clarke, *Business Development Director*
- **Church's Financial Planning** - Mark Turkington, *Managing Director*
- **Clifton Asset Management PLC** - Stephen Feldwick, *Group Business Development Manager*

- **Close Brothers Asset Management** - James Hancher, *Practice Director*
- **Concept Financial Planning** - Colin Selway, *Business Development Manager*
- **Connor Broadley Ltd** - Colin Fleming, *Chief Operating Officer*
- **Crowe Financial Planning UK Limited** - Phil Smithyes, *Managing Director, Financial Planning*
- **Dartington Wealth Management** - Andrew Coury, *Director*
- **Delta Financial Management** - Amin Malik, *Director*
- **Delta Financial Management** - Jarrod Ellis, *Director*
- **Elevation Wealth Management** - Tony Smith, *Group Managing Director*
- **Ellis Bates Financial Solutions LTD** - Michael Cope, *Managing Director*
- **Ergowealth Ltd** - Alastair Whitehead, *Chief Executive Officer*
- **Executive Advisory Services Limited** - Gavin Tisshaw, *Chairman*
- **Executive Advisory Services Limited** - Harriet Skinner, *Director*
- **Fensham Howes Ltd** - Giles Pidcock, *Director and Co-Founder*
- **Fingerprint Financial Planning** - Paul Spencer-Nixon, *Financial Planner & Principal Partner*
- **Francis Clark Financial Planning Ltd** - Andy Hammond, *Managing Director*
- **Generation Financial Services Ltd** - Andrew Waller, *Director*
- **Gerrard Stuart Financial Services Limited** - Andrew Pitman, *Director*
- **Good Will Financial Services Ltd** - John Reilly, *Managing Director*
- **Grosvenor Corlett Bird Ltd - AR of TenetConnect Services** - Paul Bird, *Director*
- **Grosvenor Wealth Management Ltd** - Tony Sellers, *Corporate Adviser*
- **HB Dobbin Financial Planning** - Julia Copeland, *Director, Compliance & Business Operations Manager*
- **HB Dobbin Financial Planning** - Michael Broom, *Director*
- **Holden & Partners LLP** - Steven Pyne, *Managing Partner*
- **Informed Choice** - Shelley McCarthy, *MD & Chartered Financial Planner*
- **Investment Quorum Ltd** - Petronella West, *Chief Executive Officer*
- **Investment Solutions Wealth Management Ltd** - Ivan Lyons, *Managing Director*
- **Jigsaw Compliance Services** - Leon Thompson, *Compliance Consultant*
- **Joseph Lamb** - Martin Lamb, *Chief Executive Officer*
- **Kensingtons Asset Management Ltd** - Stephen Roach, *Managing Director*
- **Lacomp Plc** - Peter Buxtorf, *Managing Director*
- **Lawlerdavis Independent Financial Planners Ltd** - Sarah Lawler, *Director*
- **London Financial Consultants- appointed rep of New Leaf Distribution** - Jas Ahuja, *Managing Director*
- **MAP Financial Limited** - Andrew Pople, *Managing Director*
- **Matthew Douglas Ltd** - Russell Brett, *Director*
- **Mindful Financial Planning** - Martyn Davies, *Director*

- **Nicholls Stevens Financial Services** - Carole Nicholls, *Managing Director*
- **P F M Associates Ltd** - Isabel Sinclair, *Director*
- **Panacea Adviser** - Derek Bradley, *Chief Executive Officer*
- **Parkgate FS LLP** - Steve Braidford, *Managing Partner*
- **Penney, Ruddy & Winter Ltd** - David Penney, *Director*
- **Premier Financial Management Ltd** - Trevor Jackson, *Director*
- **Prime Wealth Solutions** - Phil Meeks, *Managing Director*
- **Primera Wealth Management** - Neil Donnelly, *Managing Director*
- **Richardsons Financial Services Ltd** - Bernie Hawkes, *Director*
- **Rouse Ltd** - Andrew White, *Director & Financial Planner*
- **SFIA Group Ltd** - Chris Procter, *Managing Director*
- **Sanlam UK** - Eleanor Ingilby, *Discretionary Portfolio Manager & Head of Harrogate Office*
- **Sanlam UK** - Paula Eddery, *Head of Wealth Proposition*
- **Stocker Blaxsell Grant Wealth Management Ltd** - Simon Blaxsell, *Director*
- **Succession Wealth** - Andy Barr, *Private Wealth Management Specialist*
- **Succession Wealth** - Paul Morrish, *Group Corporate Director*
- **The Premier Partnership Limited** - Nigel Herrick, *Director*
- **Timothy James & Partners Ltd** - Dawn Buckland, *Director*
- **Walden Capital** - David Cooper, *CEO*
- **Walden Capital** - John Stirling, *Director*
- **Walpole Financial Ltd** - Oliver Slade, *Director & Financial Planner*
- **Walpole Financial Ltd** - Robbie Spencer, *Director & Financial Planner*
- **Wardour Financial Planners Ltd** - Nigel Burgess, *Director*
- **Wingate Financial Planning** - Alistair Cunningham, *Chartered Financial Planner*
- **Wise Investment** - Angus Aston, *Senior Financial Planner*

SPONSORS & EXPERTS

- **Aviva Investors** - Mark Young, *Client Solutions Manager, UK Wholesale*
- **Aviva Investors** - Thomas Stokes, *Investment Director, Multi-assets*
- **BNY Mellon Asset Management** - James Snelling, *Regional Investment Director*
- **Benchmark Capital** - Keith Hare, *Head of Corporate Development*
- **Benchmark Capital** - Lisa Jones, *Head of Business Development*
- **Carmignac** - David Beacham, *Business Development Director, Head of Regional Sales*
- **Dimensional Fund Advisors Ltd** - David Jones, *Head of UK & Ireland Adviser Group & Vice President*
- **Dimensional Fund Advisors Ltd** - Steven Greenfield, *Regional Director & Vice President*

- **Hymans Robertson Financial Services LLP** - Neale Hayter, *Business Development Manager - South*
- **Hymans Robertson Financial Services LLP** - Rob Dorling, *Business Development Manager*
- **Hymans Robertson Financial Services LLP** - William Marshall, *Head of Wealth Investments*
- **NS&I** - Andrew Pike, *Head of Intermediary Relationships*
- **NS&I** - Madalina Oros, *Senior Intermediary Marketing Manager*
- **Quilter plc** - Edward Peck, *Regional Manager - London / South East*
- **Quilter plc** - Jon Hogg, *Retirement Specialist*
- **Quilter plc** - Tom Hawkins, *Business Development Manager, South Region*
- **Ruffer LLP** - Ian Rees, *Investment Director*
- **Ruffer LLP** - Toby Barklem, *Business Development Director*

FACILITATORS & SPEAKERS

- **EY** - George Riddell, *Director of Trade Strategy*