

## Sponsors



## Participant List

- **Abram Partnership Ltd**, *Co-Director*
- **Adviser Business Solutions Ltd**, *Director*
- **Aisa Retirement Planning LLP**, *Director*
- **Alan Boswell & Co Ltd**, *Director*
- **Allonby + Partners Ltd**, *Founder*
- **Aspira Corporate Solutions Limited A/R LEBC**, *Regional Manager - South & South West*
- **Beaufort Financial Reading**, *Director*
- **Blackstone Moregate Ltd**, *Director*
- **Blaxsell Financial Planning Ltd**, *Director*
- **Broom Consultants Ltd**, *Director*
- **Broom Consultants Ltd**, *Managing Director*
- **Burlington Associates Ltd**, *Managing Director*
- **CMS Financial Management Limited**, *Chief Executive Officer*
- **Carpenter Box LLP**, *Partner*
- **Casterbridge Wealth Ltd**, *Managing Director & Head of Distribution*
- **Casterbridge Wealth Ltd**, *Relationship Manager*
- **Cavendish Medical Ltd**, *Chief Executive Officer*
- **Cavendish Ware Limited**, *Director*

- **Chetwood Wealth Management Ltd**, *Managing Director*
- **Chiltern Consultancy Limited**, *Managing Director*
- **Chris Leach & Associates Ltd**, *Managing Director*
- **Clairville York - acquired by Independent Wealth Planners**, *Chief Executive*
- **Clark Gillone**, *Director*
- **Clifton Asset Management PLC**, *Group Business Development Manager*
- **Cormorant Partnership LLP**, *Partner*
- **Crowe Financial Planning UK Limited**, *Managing Director, Financial Planning*
- **Dartington Wealth Management Limited**, *CEO*
- **Delta Financial Management Limited**, *Director*
- **Douglas Steers & Company Ltd**, *Director*
- **Elevation Wealth Management Ltd**, *Group Managing Director*
- **Executive Advisory Services Limited**, *Chairman*
- **Executive Advisory Services Limited**, *Director*
- **FS247 Ltd**, *Financial Planner & Principal Partner*
- **Fiducia Wealth Management Limited**, *Managing Director & Financial Planner*
- **Financial Management IFA**, *Director*
- **Generation Financial Services Ltd**, *Consultant*
- **Goodmans Financial Planning Ltd**, *Managing Director*
- **Grant Financial Planning Ltd**, *Director*
- **Grosvenor Corlett Bird Ltd - AR of TenetConnect Services**, *Director*
- **Grosvenor Wealth Management Ltd**, *Director*
- **HB Dobbin Financial Planning**, *Director*
- **Harding Financial Limited**, *Managing Director*
- **Headley Financial Services Limited**, *Director*
- **Herbert & Webster Ltd**, *Managing Director*
- **Holden & Partners LLP**, *Managing Partner*
- **Informed Choice Ltd**, *Managing Director*
- **Investment Quorum Ltd**, *Chief Executive Officer*
- **J Finance Ltd**, *Director*
- **John Lamb Hill Oldridge Ltd**, *Managing Director*
- **Just Wealth (part of Just Mortgages)**, *Head of Wealth*
- **Lacomp Plc**, *Managing Director*
- **LawlerDavis Independent Financial Planners Limited**, *Director*
- **London Financial Consultants Limited**, *Managing Director*
- **Lynas Vokes Investments Ltd**, *Managing Director*
- **MAP Financial Ltd**, *Managing Director*

- **Mindful Financial Planning**, *Director*
- **Moore Kingston Smith Financial Advisers**, *Chartered Financial Planner & Managing Director*
- **Nicholls Stevens (Financial Services) Limited**, *Managing Director*
- **PK Financial Planning LLP**, *Director*
- **Panacea Adviser**, *Chief Executive Officer*
- **Penney, Ruddy & Winter Ltd**, *Director*
- **Premier Financial Management Ltd A/R Amber River**, *Director*
- **Richardsons Financial Services Limited**, *Director*
- **Rouse Ltd**, *Director & Financial Planner*
- **S4 Financial Ltd**, *Managing Director*
- **Timothy James and Partners Ltd**, *Director*
- **Timothy James and Partners Ltd**, *Financial Adviser*
- **Unbiased Financial Group LLP**, *Chartered Wealth Manager*
- **Walden Capital**, *Chief Executive Officer*
- **Walden Capital**, *Director*
- **Wise Investment**, *Chief Executive Officer*
- **Wise Investment**, *Senior Financial Planner*

## SPONSORS & EXPERTS

- **Abrdn**, *Senior Investment Manager*
- **Benchmark Capital**, *Senior Acquisitions Consultant*
- **Benchmark Capital**, *Senior Business Development Consultant*
- **Charles Stanley Plc**, *Head of Intermediary Sales*
- **Charles Stanley Plc**, *Head of Strategic Partnerships*
- **Dimensional Fund Advisors Ltd**, *Regional Director & Vice President*
- **Dimensional Fund Advisors Ltd**, *Regional Director, Practice Management and Vice President*
- **Dimensional Fund Advisors Ltd**, *Regional Director*
- **Dynamic Planner**, *Business Development Consultant*
- **Dynamic Planner**, *Head of Business Development SME*
- **Dynamic Planner**, *Proposition Director*
- **Herrington Carmichael LLP**, *Partner, Corporate & Commercial*
- **Herrington Carmichael LLP**, *Solicitor, Employment*
- **Nomura Asset Management**, *Business Development Director*
- **Nomura Asset Management**, *Head of UK and Ireland Wholesale Distribution*
- **Nomura Asset Management**, *Senior Client Portfolio Manager*
- **Nucleus**, *Proposition Director*
- **Nucleus**, *Strategic Account Director*

## FACILITATORS & SPEAKERS

- **Catalyst Partners**, *Director*
- **Catalyst Partners**, *Director*
- **Change Squared Ltd**, *Director of Progress*
- **Financial Conduct Authority**, *Head of Department - Consumer Investments Supervision*
- **FoxRed Insight**, *Managing Partner (and Business Adviser to Solve Partners)*
- **Independent**, *Project Director*
- **Keynote Speaker**, *Marketing, Data, Analytics Lead and Broadcaster*
- **Keynote Speaker**
- **Killik & Co**, *Founder and Director*
- **Owen James Events**, *Managing Director*
- **Silverback Consultancy**, *Founder*
- **Sionic**, *Director - Wealth & Private Banking*
- **Svenja Keller Ltd**, *Founder and Director*

## INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Jigsaw Compliance Services**, *Compliance Consultant*