

Sponsors



Participant List

- **3D Financial Planning**, *Director & IFA*
- **Adviser Business Solutions**, *Director*
- **Aisa Professional**, *Chairman of the Investment Committee*
- **Aisa Professional**, *Director*
- **Aisa Retirement Planning**, *Partner*
- **Allied Luptons**, *Managing Director*
- **Allonby + Partners**, *Founder*
- **Atlas Wealth**, *Financial Adviser*
- **Blackstone Moregate**, *Director*
- **Blaxsell Financial Planning**, *Director*
- **Broom Consultants**, *Chairman*
- **Broom Consultants**, *HR Manager & Board Director*
- **Burlington Associates**, *Managing Director*
- **Campbell Munro**, *Managing Director*
- **Cavendish Ware**, *Director*
- **Church's Financial Planning**, *Managing Director*
- **Clark Gillone**, *Director*
- **Crowe Financial Planning**, *Operations Director*
- **Dartington Wealth Management**, *CEO*
- **David James Wealth**, *CEO*
- **Douglas Steers & Company**, *Director*

- **Executive Advisory Services**, *Director*
- **Fairstone Financial Management**, *Office Principal/Financial Planner*
- **Fiducia Wealth Management**, *Director*
- **Fiducia Wealth Management**, *Managing Director & Financial Planner*
- **Finli**, *Director & Independent Financial Planner*
- **Four Pillars Financial Planning**, *Director*
- **Generation Financial Services**, *Consultant*
- **Generation Financial Services**, *Director*
- **Goalkeep**, *Managing Director*
- **Grosvenor Corlett Bird**, *Director*
- **H V Financial Planning**, *Director*
- **HB Dobbin Financial Planning**, *Director*
- **Heron House Financial Management**, *Managing Director*
- **Informed Choice**, *Managing Director*
- **John Lamb Hill Oldridge**, *Managing Director*
- **Lynas Vokes Investments**, *Director*
- **Lynas Vokes Investments**, *Managing Director*
- **MWA Financial**, *Director*
- **Margetts Wealth Management**, *Managing Director*
- **Matthew Douglas**, *Director*
- **Mindful Financial Planning**, *Director*
- **Moore Kingston Smith Financial Advisers**, *Chartered Financial Planner & Managing Director*
- **Nicholls Stevens**, *Managing Director*
- **PK Financial Planning**, *Director*
- **Richardsons Financial Services**, *Director*
- **Rouse**, *Director & Financial Planner*
- **Simpson Wood**, *Compliance & Operations Director*
- **Timothy James and Partners**, *Director*
- **Timothy James and Partners**, *Financial Adviser*
- **True Potential Wealth Management**, *Wealth Management Partner*
- **Unbiased Financial Group**, *Chartered Wealth Manager*
- **Walden Capital**, *Director*
- **Warden Consulting**, *Founder*
- **Wardour Financial Planners**, *Director*

FACILITATORS & SPEAKERS

- **Keynote Speaker**, *Chief Research Officer*

- **Keynote Speaker**, *Founder at Boxlight*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Buckingham Research & Consultancy**, *Investment Consultant*
- **SBR Consulting**, *Management Consultant*
- **UK Community Foundations**, *CEO*