

Sponsors



Participant List

- **Aisa Professional**, *Director*
- **Applewood Independent Limited A/R AFH**, *Managing Director*
- **Armstrong Watson Financial Planning Limited**, *Financial Planning Director – Operations & Commercial*
- **Asset Intelligence Portfolio Management Limited**, *Director, Head of Research & Principal*
- **Azets Wealth Management**, *Chief Operating Officer*
- **Azets Wealth Management**, *CEO*
- **Becketts Fs Ltd**, *Director & Independent Financial Adviser*
- **Becketts Fs Ltd**, *Director*
- **Between Jobs**, *Senior Private Banker*
- **Boolers**, *Business Owner & Chartered Financial Planner*
- **Broom Consultants Ltd**, *Chairman*
- **Canford & Castle Financial Planning**, *Director*
- **Clark Gillone A/R Finli Group**, *Director*
- **Coppice Wealth**, *Managing Director*
- **Corporate & Personal Investment Planning LTD**, *Chief Executive Officer*
- **Dodd & Co Wealthcare**, *Director*
- **Fairstone Financial Management Ltd**, *Principal/Financial Planner*
- **Fensham Howes Ltd**, *Managing Director, Private Client*
- **Finli (FLP) Ltd**, *Managing Director*
- **Finli (FLP) Ltd**, *Director & Independent Financial Planner*
- **Franklyn Financial Management Ltd A/R SJP**, *Chief Operating Officer*
- **Gerrard Stuart Financial Services Limited**, *Director*
- **Harris & Co Financial Planning Ltd**, *Director*
- **Ideal Financial Management Limited**, *Financial Planner / Director*
- **Independent Consultant**, *Director*
- **Independent Financial Strategists Ltd**, *Director*
- **Informed Financial Planning**, *Managing Director*
- **Intelligence Wealth Management Ltd**, *Director*
- **Landmark IFA Ltd**, *Director*
- **Lockhart Consultancy Ltd**, *Director*
- **Lynas Vokes Investments Ltd**, *Managing Director*
- **Margetts Wealth Management Ltd**, *Managing Director*
- **Mindful Financial Planning**, *Director*
- **Openwork Limited**, *Business Consultant*
- **Optimum Path**, *Managing Director*
- **Pensionhelp Limited**, *Business Development Manager*
- **Prime Wealth Solutions**, *Managing Director*

- **Professional Independent Wealth Advice (PIWA)**, *Chief Operating Officer*
- **Prosperis Ltd**, *Managing Director*
- **Symphony Financial Advisers Limited**, *Director*
- **Symphony Financial Advisers Limited**, *Managing Director*
- **The Superbia Group**, *Head of Financial Planning*
- **Tier One Capital**, *Wealth Manager*
- **Walden Capital**, *Chief Executive Officer*
- **WDS Wealth Management Ltd**, *Equity Partner & Director*

Industry Bodies, Regulators, Associations & Guests

- **Simplybiz Ltd**, *Finance Business Partner - Intermediaries*