

## 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**
- **Boilers, 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 Healthcare, 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*