

THE FESTIVAL PROGRAMME

Participant List

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Inspiring Philanthropy and Investing for Impact



Festival of Finance

Participant List

- **2 Plan Wealth Management Limited**, *Independent Financial Adviser*
- **2 Plan Wealth Management Limited**, *Technology Director*
- **2 Plan Wealth Management Limited**, *Managing Director*
- **2 Plan Wealth Management Limited**, *Independent Financial Adviser*
- **Aaron Tawny Mortgages Limited**, *Managing Director & IFA*
- **Advice Wise Ltd**, *Director*
- **Adviser Services Holdings Ltd**, *Head of Policy*
- **Adviser Services Holdings Ltd**, *Group Compliance Director*
- **AFH Wealth Management Nantwich**, *Divisional Director*
- **Aisa Professional**, *Director*
- **Altior Asset Management Ltd**, *Director*
- **Altior Asset Management Ltd**, *Director & IFA*
- **Altior Asset Management Ltd**, *Adviser Support*
- **Altior Asset Management Ltd**, *Practice Manager*
- **Altior Asset Management Ltd**, *IFA*
- **Attivo Group**, *Chief Risk Officer*
- **Aurora Financial IFA Limited**, *Director*
- **Azets Wealth Management**, *Chief Operating Officer*
- **Baggette & Company Wealth Management Limited**, *Managing Director*
- **Baggette & Company Wealth Management Limited**, *CEO*
- **Balance: Wealth Planning Limited**, *Operations Director*
- **Becketts Fs Ltd**, *Director*
- **Beyond Advice Group (formerly Markland Hill Wealth)**, *Chief Executive Officer*
- **Binary Capital Investment Management**, *Head of Sales*
- **Binary Capital Investment Management**, *Adviser Success*
- **Blaxsell Financial Planning Ltd**, *Director*
- **Boolers**, *Business Owner & Chartered Financial Planner*
- **Bowmore Asset Management Limited**, *Private Client Director*
- **Bowmore Financial Planning Limited**, *Head of Private Client*
- **Brian Mellor Financial Services Limited**, *Compliance Manager*
- **Brilliance Financial Planning Ltd**, *Wealth Manger*
- **Cadence Financial Management**, *CEO*
- **CBFP UK Ltd**, *Financial Planner*
- **CBFP UK Ltd**, *Executive Director*
- **Celtic Financial Planning Ltd**, *Managing Director*
- **Chamberlain Wealth Management Limited**, *Managing Director*

- **Cheltenham Independent Financial Advisers Ltd**, *Client Relationship Manager*
- **Cheltenham Independent Financial Advisers Ltd**, *Operations Manager*
- **Clarity Wealth Management LLP**, *Chartered Financial Planner*
- **Clark Gillone A/R Finli Group**, *Director*
- **Clear Solutions (Wealth and Tax Management) Ltd**, *Managing Director*
- **Collingbourne Wealth Management Ltd**, *Director*
- **Colmore Partners**, *Director*
- **Colmore Partners**, *Chartered Financial Planner*
- **Colmore Partners**, *Managing Director*
- **Compliance & Training Solutions Ltd (CATS)**, *Managing Director*
- **Coutts & Co**, *Head of Customer Proposition*
- **Crowe Financial Planning UK Limited**, *Compliance Director*
- **Culverhouse Financial Planning Ltd**, *Director*
- **De Carteret Wealth**, *Chief Executive Officer*
- **Dodd & Co Wealthcare**, *Director*
- **Dodd & Co Wealthcare**, *Director*
- **Dodd & Co Wealthcare**, *Director*
- **Dodd & Co Wealthcare**, *Director*
- **Downing LLP**, *Fund Manager*
- **Downing LLP**, *Fund Manager of MGTS Downing Fox Funds*
- **DRB Associates Ltd**, *Co-Owner & Director*
- **DTB Investments Ltd**, *Director*
- **Eason Rose Limited**, *Managing Director*
- **Evelyn Partners**, *Head of Financial Planning Advice*
- **Fairstone Financial Management Ltd**, *Principal/Financial Planner*
- **Fidelity International**, *Head of Wealth & Guidance*
- **Fidelius**, *Commercial Director*
- **Fidelius**, *Growth Manager*
- **Footes Financial Planning UK Limited**, *Director & IFA*
- **Forvis Mazars Financial Planning Limited**, *Partner, Head of Financial Planning*
- **Forvis Mazars Financial Planning Limited**, *Operational Change Lead*
- **Forvis Mazars Financial Planning Limited**, *Proposition Associate Director*
- **Forvis Mazars Financial Planning Limited**, *Traineeship Associate Manager*
- **Forvis Mazars Financial Planning Limited**, *Compliance Associate Director*
- **Foursquare Financial Management Ltd**, *Chartered Financial Planner*
- **Gemini Wealth Management**, *Head of Advice*
- **Global Advice Group Ltd**, *Director*
- **H.S.P. Financial Planning Limited**, *Director*
- **H.S.P. Financial Planning Limited**, *Director & IFA*
- **Hamilton Financial (Scotland) Ltd**, *Managing Director*

- **Hanbury Wealth LLP**, *Client Account Manager*
- **Hanbury Wealth LLP**, *Director*
- **Hargreaves Lansdown Asset Management Limited**, *Head of Advisory Operations*
- **Harrogate Wealth Management Limited**, *Director*
- **Hay Hill Wealth Management**, *Investment Director*
- **Hazelton Mountford Jefferies Limited**, *Independent Financial Adviser*
- **Hazelton Mountford Jefferies Limited**, *Independent Financial Adviser*
- **Holyoakes Group Ltd**, *Compliance Director*
- **HW Independent Financial Management**, *Managing Director*
- **IBOSS Asset Management Limited (acquired by Kingswood)**, *Chief Investment Officer*
- **IFT Wealth Management Ltd**, *Managing Director*
- **Independent**, *Director*
- **Informed Financial Planning**, *Managing Director*
- **Integrity365**, *Operations Director*
- **IronMarket Ltd**, *Ntwrk CEO*
- **Isio Wealth Planning**, *Head of Wealth*
- **Isio Wealth Planning**, *Head of Region*
- **Jane Newman Financial Planning Ltd**, *Director*
- **Jane Newman Financial Planning Ltd**, *CEO*
- **Jeremy Kaye Portfolio Management Limited**, *Director*
- **Jeremy Kaye Portfolio Management Limited**, *Director*
- **Julius Baer International Ltd**, *Head of Digital Channels*
- **Just**, *Investment and Financial Planning Director*
- **Killik & Co**, *Project Manager*
- **King Financial Planning – AR of Tavistock**, *Managing Partner*
- **Kirkpatrick Kennedy**, *Principal*
- **Leodis Wealth Management A/R Amber River**, *Head of Financial Planning*
- **Lightside Financial Planning**, *Director*
- **Lightside Financial Planning**, *Director*
- **Lloyds Financial Services**, *Senior Advice Framework Manager*
- **Lynas Vokes Investments Ltd**, *Financial Planner*
- **Lynas Vokes Investments Ltd**, *Chartered Financial Planner*
- **Lynas Vokes Investments Ltd**, *Managing Director*
- **Lynas Vokes Investments Ltd**, *Director*
- **M4 Financial Group Ltd**, *Managing Director*
- **Macbeth Financial Services Ltd A/R 2plan**, *Managing Director*
- **Mallory Wealth Limited**, *Executive Director*
- **McInroy & Wood Ltd**, *Chief Executive Officer*

- **Medhaven Financial Planning A/R 2plan**, *Director & Independent Financial Planner*
- **Medical and General Independent Financial Advisers Ltd**, *Director*
- **Midsummer Wealth A/R Best Practice IFA Group**, *Managing Director*
- **Miller James Financial Planning Limited A/R 2plan**, *Director/Owner*
- **Mindful Financial Planning**, *Director*
- **Moai Wealth**, *Founder & CIO*
- **Montfort International Limited**, *Associate*
- **Montfort International Limited**, *Principal*
- **MSBM Wealth Limited**, *Financial Adviser*
- **Nicholls Stevens (Financial Services) Limited**, *Managing Director*
- **Northumbrian Financial Ltd**, *Managing Director*
- **Oakfield Financial Services Limited**, *Paraplanner*
- **Oakfield Financial Services Limited**, *Managing Director*
- **Obsidian Technologies Ltd**, *Head of Compliance*
- **Paradigm**, *Managing Director, Paradigm Mortgage Services*
- **Paradigm**, *Commercial Director*
- **Paradigm**, *Mortgage Helpdesk Manager*
- **Paradigm**, *Business Development Director*
- **Parmenion Capital Partners LLP**, *Intermediary Distribution Director*
- **Parmenion Capital Partners LLP**, *Chief Commercial Officer*
- **Paul Murray Investments**, *Director*
- **Paul Russell Financial Services**, *Director*
- **Pensionhelp Limited**, *Managing Director*
- **Pensionhelp Limited**, *Business Development Manager*
- **Peregrine & Black Investment Management Ltd**, *Managing Director*
- **Pi Financial Ltd**, *Managing Director*
- **Pi Financial Ltd**, *Chartered Financial Planner*
- **Plain Savings Ltd**, *Managing Director*
- **Plain Savings Ltd**, *Senior Paraplanner*
- **Platforum**, *Head of Editorial Strategy*
- **PM+M Wealth Management Limited**, *Compliance and T&C Manager*
- **PM+M Wealth Management Limited**, *Director - Operations*
- **Portcullis Financial Planning Limited**, *Director*
- **Portfoliometrix Asset Management Ltd**, *CEO*
- **Portfoliometrix Asset Management Ltd**, *Managing Director*
- **Prosperity Wealth Ltd A/R Fairstone**, *Head of Office*
- **Prosperity Wealth Ltd A/R Fairstone**, *Financial Adviser*
- **Purposeful Group (formerly Finitor Wealth)**, *Chairman*
- **QPI Ltd**, *Business Development Director*

- **QPI Ltd**, *Director*
- **Quanta Group**, *Managing Director - Craven Street Wealth*
- **R C Brown Investment Management Plc**, *Sales & Marketing Director*
- **Radcliffe & Co Life & Pensions Limited**, *Head of Compliance*
- **Raymond James Investment Services Ltd**, *Managing Director of Wealth Management Services*
- **Real Wealth Partners**, *Founding Director*
- **Red Circle Financial Planning**, *Chartered Financial Planner*
- **Rockhold Asset Management**, *Investment Director*
- **RSQ Wealth Management**, *Managing Director*
- **RSQ Wealth Management**, *Director and Co-Founder*
- **RSQ Wealth Management**, *Director and Co-Founder*
- **Shackleton Advisers**, *Group Compliance Director*
- **Shard Capital**, *Chief Operating Officer*
- **Soderberg & Partners**, *Growth Manager*
- **Soderberg & Partners**, *Growth Manager*
- **Sovereign Financial Planners Limited**, *Financial Adviser*
- **Sovereign Financial Planners Limited**, *Financial Adviser*
- **Sovereign Financial Planners Limited**, *Financial Adviser*
- **Sovereign Financial Planners Limited**, *Managing Director*
- **Sovereign Financial Planners Limited**, *Financial Adviser*
- **Sovereign Financial Planners Limited**, *Financial Adviser*
- **Spentwell**, *Managing Director*
- **Standard Chartered Bank**, *Executive Director*
- **Standard Life**, *Senior Pensions Product Manager*
- **Storeton Rose Financial Planning Ltd A/R 2plan**, *Practice Manager*
- **Storeton Rose Financial Planning Ltd A/R 2plan**, *Director & Chartered Financial Planner*
- **Sutton Oaks Wealth Management Limited**, *Chartered Financial Planner*
- **Tacit Investment Management**, *Director*
- **The Aspire Partnership LLP**, *Managing Partner*
- **The Aspire Partnership LLP**, *Partner*
- **The Aspire Partnership LLP**, *Partner*
- **The Aspire Partnership LLP**, *Partner & Financial Planner*
- **The Aspire Partnership LLP**, *Partner*
- **The Aspire Partnership LLP**, *Partner*
- **The Choice IFA Network Ltd**, *Director*
- **The Premier Partnership Limited**, *Director*
- **The Private Office**, *Snr Partner & Financial Planner*
- **The Stonegate Wealth Group Ltd**, *Managing Director*

- **The Stonegate Wealth Group Ltd**, *Independent Financial Adviser*
- **The Superbia Group**, *Head of Financial Planning*
- **Thompson Little**, *Principal*
- **threesixty services LLP**, *Chief Executive Officer*
- **Timothy James and Partners Ltd**, *Director*
- **Timothy James and Partners Ltd**, *Financial Adviser*
- **Titan Wealth Planning**, *Managing Director*
- **Tony Walker Financial Planning Services Limited**, *Director*
- **True Potential Wealth Management LLP**, *CEO of True Potential Wealth Management*
- **True Potential Wealth Management LLP**, *Research Administrator*
- **True Potential Wealth Management LLP**, *Wealth Management Partner*
- **Twigden Asset Management Limited**, *Financial Adviser*
- **Twigden Asset Management Limited**, *Director*
- **Twigden Asset Management Limited**, *Paraplanner*
- **Twigden Asset Management Limited**, *Office Manager*
- **Utopia Wealth Planning Ltd**, *Director*
- **Utopia Wealth Planning Ltd**,
- **Validpath Ltd**, *Proposition Director*
- **Venn Wealth Management**, *Director*
- **Walden Capital**, *Director*
- **Walker Crips Wealth Management Limited**, *Director - Investment Management*
- **WDS Wealth Management Ltd**, *Equity Partner & Director*
- **Wensons Financial Ltd**, *Financial Planner*
- **Westminster Wealth Management LLP**, *Compliance Officer*
- **Whateley Wealth Management Limited**, *Director*
- **Whitebeam Independent Financial Advice Ltd**, *Independent Financial Adviser*
- **William Highbourne Wealth Management Limited**, *CEO*
- **WKM Wealth Ltd**, *Director*
- **WKM Wealth Ltd**, *Chartered Financial Planner and Director*

Sponsors & Experts

- **FS Legal**, *Partner*

Facilitators & Speakers

- **Buckingham Research & Consultancy Ltd**, *Investment Consultant*
- **Independent Consultant**, *Was Chief Executive Officer @ Hawksmoor*
- **Jigsaw Tree Limited**, *Founder and Director*

Facilitators & Speakers

- **Jigsaw Tree Limited**, *Operations Director*
- **Milliman UK**, *Consultant*
- **Mint Blue Consulting Ltd**, *Owner and Director*
- **Pivot Strategies Ltd**, *Co-Founder*
- **Pivot Strategies Ltd**, *Managing Director*
- **SBR Consulting**, *Management Consultant*

Industry Bodies, Regulators, Associations & Guests

- **AlboC**, *Chief Sales Officer*
- **Independent Consultant**, *Director & Independent Financial Planner*
- **Independent Consultant**, *Corporate Development Director*
- **Independent Consultant**, *Was Head of Client Solutions Group @ Kleinwort Hambros*
- **Stewardship**, *Growth & Relationships Manager*