

## Sponsors



## Participant List

- Alan Boswell & Co Ltd, *Senior Paraplanner*
- Apropos Wealth Management Ltd, *Financial Planner*
- Apropos Wealth Management Ltd, *Paraplanner*
- Apropos Wealth Management Ltd, *Paraplanner*
- Arbuthnot Latham & Co Ltd, *Head of Paraplanning*
- Arbuthnot Latham & Co Ltd, *Wealth Planning Executive*
- Baker Gladstone & York, *Paraplanner*
- Balance: Wealth Planning, *Paraplanner*
- Birchwood Investment Management Ltd, *Financial Adviser*
- Birchwood Investment Management Ltd, *Paraplanner*
- Blackstone Moregate Ltd, *Paraplanner*
- Blevins Franks Financial Management Ltd, *Financial Planner*
- Blevins Franks Financial Management Ltd, *Paraplanner*
- Broom Consultants Ltd, *Office Manager*
- Broom Consultants Ltd, *Paraplanner and Financial Adviser*
- Broom Consultants Ltd, *Paraplanner*
- Broom Consultants Ltd, *Paraplanner*
- Brown Shipley & Co Ltd, *Paraplanner*
- Cazenove Capital Management Ltd, *Paraplanner*
- Church's Financial Planning, *Paraplanner*
- Church's Financial Planning, *Trainee Planner*
- City Asset Management Plc, *Paraplanner*
- City Asset Management Plc, *Paraplanner*
- Clairville York - acquired by Independent Wealth Planners, *Paraplanner.*

- **Clear Cut Financial Planning**, *Paraplanner*
- **Clear Cut Financial Planning**, *Support Paraplanner*
- **Close Brothers Asset Management**, *Paraplanner*
- **Crowe Financial Planning UK Limited**, *Paraplanner*
- **Dentons Wealth**, *Paraplanner*
- **Dentons Wealth**, *Paraplanner*
- **Dentons Wealth**, *Technical Advisory Support Manager*
- **Ergowealth Ltd**, *Head of Technical*
- **Ergowealth Ltd**, *Technical Analyst*
- **Essential Wealth Management**, *Client Manager*
- **Fairstone Financial Management Ltd**, *Paraplanner.*
- **Fairstone Financial Management Ltd**, *Paraplanner*
- **Goodman Chartered Financial Planners**, *Paraplanner*
- **Goodman Chartered Financial Planners**, *Paraplanner*
- **Griffins Financial Solutions Ltd**, *Paraplanner*
- **H V Financial Planning Ltd**, *Paraplanner*
- **HFMC Wealth LLP**, *Chartered Financial Planner and Senior Technical Consultant*
- **HFMC Wealth LLP**, *Paraplanner*
- **HFMC Wealth LLP**, *Technical Consultant*
- **HFS Milbourne Financial Services**, *Paraplanner*
- **HJS Financial Planning**, *Paraplanner*
- **HW Fisher - Close Brothers AM**, *Paraplanner*
- **Handelsbanken Wealth Management**, *Wealth Planning Team Leader*
- **Homecroft Cavendish**, *Paraplanner*
- **Hughes & Co**, *Outsourced Paraplanner*
- **Integrity365**, *Paraplanner*
- **Investec Wealth & Investments**, *Paraplanner*
- **Investec Wealth & Investments**, *Senior Paraplanner*
- **Investec Wealth & Investments**, *Senior Paraplanner*
- **Investment Quorum Ltd**, *Associate Wealth Manager*
- **KMG Independent Ltd**, *Paraplanner*
- **Lewis Brownlee Financial Services Ltd**, *Paraplanner*
- **Lewis Brownlee Financial Services Ltd**, *Paraplanning Manager*
- **Lockhart Capital Management LLP**, *Head of Client Advice*
- **Lockhart Capital Management LLP**, *Technical Analyst*
- **London & Capital**, *Paraplanner*
- **London & Capital**, *Private Clients Executive*

- **Lyndhurst Financial Management Limited**, *Head of Paraplanning*
- **Maskell Moss & Co Ltd**, *IFA*
- **Maskell Moss & Co Ltd**, *Paraplanner*
- **Matthew Douglas Ltd**, *Paraplanner and Office Manager*
- **New Leaf Distribution**, *Director*
- **New Leaf Distribution**, *Paraplanning Administrator*
- **OCM Wealth Management**, *Paraplanner*
- **Parkgate FS LLP**, *Head of Paraplanning*
- **Paul Young IFA**, *Paraplanner*
- **Pharon Independent Financial Advisers Ltd**, *Chartered Financial Planner and Paraplanner Manager*
- **Pharon Independent Financial Advisers Ltd**, *Paraplanner*
- **Prismatic Wealth Limited**, *Senior Associate*
- **Punter Southall Financial Management Ltd**, *Paraplanner*
- **RPG Consulting Ltd**, *Head of Technical*
- **Raymond James Investment Services Ltd**, *Senior Paraplanner*
- **SPF Private Clients**, *Chartered Financial Planner*
- **Saltus Partners LLP**, *Paraplanner*
- **Satis Asset Management Ltd**, *Client Services Manager*
- **Saunderson House**, *Client Services Manager*
- **Smith & Williamson**, *Paraplanner*
- **Stonehage Fleming Group**, *Paraplanner*
- **Strategic Solutions Financial Services**, *Head Paraplanner*
- **Strategic Solutions Financial Services**, *Paraplanner*
- **Strategic Solutions Financial Services**, *Researcher*
- **Succession Wealth**, *Head of Paraplanning Development*
- **The Fry Group**, *Paraplanner*
- **The Private Office**, *Paraplanner*
- **The Verve Group**, *Head of Verve Services*
- **The Verve Group**, *Paraplanner*
- **Timothy James & Partners Ltd**, *Finance Executive*
- **Timothy James & Partners Ltd**, *Paraplanner/Finance Executive*
- **Timothy James & Partners Ltd**, *Paraplanner*
- **Westminster Wealth Management LLP**, *Paraplanner*
- **Wingate Financial Planning**, *Paraplanning Team Manager*

## **SPEAKERS**

- **Elston Consulting**, *Head of Research*
- **Schroders Plc**, *Investment Propositions Director*
- **Starling**, *Co-Founder*

## **SPONSORS & EXPERTS**

- **Schroders Plc**, *Chief Investment Officer*
- **Schroders Plc**, *Investment Director, Thematics*
- **Schroders Plc**, *Marketing Manager*
- **Schroders Plc**, *UK Intermediary Marketing*
- **Schroders Plc**, *UK Intermediary Solutions Director*