

## Paraplanning Excellence

Tuesday 25 November 2025, Schroders Offices, 1 London Wall Place, Barbican, London, EC2Y 5AU

### Sponsor



## Participant List

- **Adsumus Financial Services**, *Compliance & Operations Manager*
- **Adsumus Financial Services**, *Paraplanner*
- **Amber Wealth Creation**, *Business Support*
- **Amber Wealth Creation**, *Senior Technical Analyst*
- **Apropos Wealth Management**, *Chartered Financial Planner*
- **Apropos Wealth Management**, *Paraplanner*
- **Ascot Lloyd**, *Paraplanning Manager*
- **Atomos**, *Financial Planning Associate*
- **Atomos**, *Head of Paraplanning*
- **Atomos**, *Paraplanning Team Leader*
- **BdhSterling**, *Paraplanner*
- **BdhSterling**, *Senior Paraplanner*
- **Brown Shipley & Co**, *Head of Wealth Planning Support*
- **Canaccord Wealth**, *Senior Paraplanner*
- **Canaccord Wealth**, *Trainee Paraplanner*
- **Cavendish Medical**, *Senior Assistant Financial Planner*
- **Cavendish Ware**, *Financial Planner*
- **China Construction Bank**, *Financial Crime Executive*
- **City Asset Management**, *Paraplanner*
- **Continuum (Financial Services)**, *Paraplanner*
- **Elevation Wealth Management**, *Account Executive*
- **Foster Denovo**, *Paraplanner*
- **Foster Denovo**, *Paraplanning Team Leader*
- **H V Financial Planning**, *Director*

- **HFMC Wealth Management**, *Chartered Financial Planner and Senior Technical Consultant HFMC*
- **Wealth Management**, *Senior Private Client Administrator*
- **Handelsbanken Wealth & Asset Management**, *Wealth Planning Team Leader*
- **Haven Paraplanning**, *Director/Paraplanner*
- **Holden & Partners**, *Financial Planning Associate*
- **JM Finn & Co**, *Paraplanner*
- **M&G Wealth**, *Paraplanner*
- **Oakfield Financial Services**, *Paraplanner*
- **Oakfield Financial Services**, *Trainee Paraplanner*
- **Paradigm Norton Financial Planning**, *Financial Planner*
- **Parafinity**, *Director*
- **Pembroke Financial Services**, *Head of Advice Proposition*
- **Pembroke Financial Services**, *Paraplanning Manager*
- **Pharon Independent Financial Advisers**, *Chartered Financial Planner and Paraplanner Manager*
- **Quilter Financial Advisers**, *Paraplanner*
- **Quilter Financial Advisers**, *Paraplanner*
- **Quilter Financial Services**, *Paraplanning Manager – QFP Network & Campaigns*
- **RBC Brewin Dolphin**, *Paraplanner*
- **RBC Brewin Dolphin**, *Wealth Executive*
- **RBC Brewin Dolphin**, *Wealth Paraplanner*
- **RT Paraplanning**, *Director & Lead Paraplanner*
- **Rathbones Group**, *Assistant Financial Planner (Paraplanner)*
- **Rathbones Group**, *Paraplanner*
- **Raymond James Investment Services**, *Chartered Paraplanner*
- **S4 Financial**, *Paraplanner*
- **Saltus Partners**, *Paraplanner*
- **Shared Objective**, *Executive Paraplanner*
- **Snazzify**, *Chartered Paraplanner & Director*
- **Timothy James and Partners**, *Financial Administrator*
- **Timothy James and Partners**, *Trainee Finance Executive*
- **TrinityBridge**, *Paraplanner*
- **True Potential Wealth Management**, *Paraplanner*
- **Vermeer Partners**, *Senior Paraplanner*
- **Wingate Wealth Management**, *Paraplanning Team Manager*
- **Wise Investment**, *Paraplanner*