

Paraplanning Excellence

Wednesday 2 December 2026, Schroders Offices, 1 London Wall Place, Barbican, London, EC2Y 5AU

Sponsor

Schroders
capital

Participant List

- **Absolute Financial Management Ltd**, *Paraplanner, Personal Assistant*
- **Absolute Financial Management Ltd**, *Research Director*
- **Adaptare Ltd**, *Paraplanner*
- **Adsumus Financial Services**, *Junior Paraplanner*
- **Adsumus Financial Services**, *Senior Paraplanner*
- **Advanta Wealth Ltd**, *Paraplanner*
- **Advanta Wealth Ltd**, *Head of Group Operations*
- **Advanta Wealth Ltd**, *Senior Paraplanner*
- **Alan Boswell & Co Ltd**, *Senior Paraplanner*
- **Alexander House Financial Services Ltd - part of Quilter**, *Paraplanner*
- **Amber Wealth Creation Ltd**, *Business Support*
- **Artorius Wealth Ltd**, *Head of Client Service*
- **Artorius Wealth Ltd**, *Client Manager*
- **Artorius Wealth Ltd**, *Paraplanner*
- **AWS Advice**, *Paraplanner*
- **Beechwood Financial Services Limited**, *Paraplanner*
- **Blithe House Financial Management Ltd**, *Head of Paraplanning*
- **BPH Wealth Management**, *Paraplanner*
- **Broom Consultants Ltd**, *HR Manager & Board Director*
- **Brown Shipley & Co Limited**, *Paraplanner*
- **Brown Shipley & Co Limited**, *Head of Wealth Planning Support*
- **Canaccord Wealth**, *Senior Paraplanner*
- **Canaccord Wealth**, *Senior Paraplanner*
- **Canaccord Wealth**, *Head of Paraplanning*
- **Canaccord Wealth**, *Senior Paraplanner*
- **Cavendish Medical Ltd**, *Senior Assistant Financial Planner*
- **Cavendish Ware Limited**, *Financial Planner*
- **Cazenove Capital**, *Paraplanner*
- **Cazenove Capital**, *Paraplanner*
- **China Construction Bank (London) Limited**, *Financial Crime Executive*
- **City Asset Management Plc**, *Paraplanner*
- **Cooper Parry Wealth**, *Paraplanner Manager*
- **Ellacotts Wealth Planning Ltd**, *Paraplanner*
- **Emery Little Wealth Management Limited**, *Paraplanner*
- **Emery Little Wealth Management Limited**, *Paraplanner*
- **EQ Investors Limited**, *Head of Technical Consulting*
- **Evans Hart Ltd (Incorporating Atwoods Ltd)**, *Paraplanner*
- **Foster Denovo**, *Paraplanner Manager*

- **Foster Denovo**, *Paraplanning Team Leader*
- **Foster Denovo**, *Senior Paraplanner*
- **Handelsbanken plc**, *Wealth Business Controls Manager*
- **Harding Financial Limited**, *Trainee Paraplanner & Financial Planner*
- **Harding Financial Limited**, *Technical Paraplanner*
- **Harding Financial Limited**, *Technical Paraplanner*
- **Harding Financial Limited**, *Trainee Paraplanner & Financial Planner*
- **Harding Financial Limited**, *Paraplanning Team Leader*
- **Harding Financial Limited**, *Technical Paraplanner*
- **Harding Financial Limited**, *Head of Paraplanning & Administration*
- **Harding Financial Limited**, *Technical Paraplanner*
- **HFMC Wealth**, *Financial Planning Manager*
- **HFMC Wealth**, *Senior Private Client Administrator*
- **HFMC Wealth**, *Junior Technical Consultant*
- **Holden & Partners LLP**, *Paraplanner*
- **Holden & Partners LLP**, *Chartered Paraplanner*
- **Independent Consultant**, *Transactions & Technical Director*
- **Isio Wealth Planning**, *Paraplanning Team Leader*
- **JM Finn & Co Ltd**, *Paraplanner*
- **John Lamb Hill Oldridge Limited**, *Adviser Support*
- **Lawrence Dawson & Co**, *Paraplanner*
- **M&G Wealth**, *Senior Manager Financial Services*
- **MWA Financial**, *Paraplanner*
- **New Leaf Distribution**, *Head of Technical Support*
- **NLP Financial Management Ltd**, *Senior Paraplanner*
- **Oakfield Financial Services Limited**, *Trainee Paraplanner*
- **Oakfield Financial Services Limited**, *Paraplanner*
- **Pharon Independent Financial Advisers Limited**, *Chartered Financial Planner and Paraplanner Manager*
- **Pharon Independent Financial Advisers Limited**, *Paraplanner*
- **Quilter Cheviot Financial Planning**, *Paraplanning Manager*
- **Quilter Financial Planning**, *Paraplanner*
- **Quilter plc**, *Paraplanning Operations Manager*
- **Rathbones Group Plc**, *Senior Paraplanning Lead*
- **Rathbones Group Plc**, *Head of Paraplanning & Support*
- **Rathbones Group Plc**, *Paraplanner*
- **RBC Brewin Dolphin Limited**, *Wealth Paraplanner*
- **RBC Brewin Dolphin Limited**, *Wealth Paraplanner*
- **RBC Brewin Dolphin Limited**, *Paraplanner*
- **S4 Financial Ltd**, *Trainee Paraplanner*
- **Saltus Partners LLP**, *Paraplanner*
- **Sparkes Paraplanning**, *Managing Director*
- **SPF Private Clients**, *Chartered Financial Planner*
- **SPF Private Clients**, *Junior Paraplanner*
- **The Openwork Partnership**, *Paraplanner*
- **The Penny Group London LLP**, *Client Service & Paraplanner Manager*
- **The Penny Group London LLP**, *Paraplanner*
- **The Private Office**, *Paraplanning Manager*
- **The Private Office**, *Paraplanning Manager*
- **The Private Office**, *Associate Director Of Advice Delivery*
- **threesixty services LLP**, *Head of Compliance Monitoring*
- **Timothy James and Partners Ltd**, *Paraplanner*
- **TrinityBridge**, *Paraplanning Manager*

- **TrinityBridge**, *Paraplanner*
- **TrinityBridge**, *Senior Paraplanner*
- **True Potential Wealth Management LLP**, *Paraplanner*
- **Vintage Wealth Management Limited**, *Paraplanner*
- **Walden Capital**, *Paraplanner*
- **Wingate Wealth Management Ltd**, *Paraplanning Team Manager*
- **Wise Investment**, *Head of Paraplanning*

Facilitators & Speakers

- **Melo (Change Squared/Exit Partnership/Aspire Exec Merged)**, *Exit Partner*