

RETIREMENT MATTERS

Thursday 30 April 2026, Royal College of Physicians, 11 St Andrews Pl, London, NW1 4LE

Sponsors



Delegates

- **3173, Chief Technology Officer**
- **Age Wage, Director**
- **Amber River, Head of Technical**
- **Appleton Gerrard Private Wealth Management, Chartered Financial Planner**
- **Arbuthnot Latham & Co Ltd, Wealth Planner**
- **AWS Financial Solutions Limited, Paraplanner**
- **Benchmark Capital, Head of Business Operations**
- **Benchmark Capital, Wealth Planning Director**
- **Canaccord Wealth, Stockbroker**
- **China Construction Bank (London) Limited, Financial Crime Executive**
- **Citi Private Bank, Head of Wealth Planning**
- **City Asset Management Plc, Paraplanner**
- **Clarity Wealth Management LLP, Independent Financial Adviser**
- **Continuum Wealth Ltd, Senior Paraplanner**
- **Defaqto Ltd., Wealth Analyst/Consultant**
- **Emery Little Wealth Management Limited, Paraplanner**
- **Emery Little Wealth Management Limited, Paraplanner**
- **Financial Care Solutions Ltd, Financial Planner**
- **Fingerprint Financial Planning, Financial Planner & Principal Partner**
- **Handelsbanken plc, Wealth Business Controls Manager**
- **Haven Paraplanning Ltd, Director/Paraplanner**
- **HFMC Wealth Management Ltd, Chartered Financial Planner and Senior Technical Consultant**
- **In Partnership Financial Advisers Limited, Chartered Financial Planner**
- **Independent, Former Head of Financial Planning**
- **Independent Consultant, former Head of Advice Proposition**
- **Independent Financial Strategists Ltd, Director**
- **Independent Living Specialists Limited, IFA**
- **King Financial Planning - AR of Tavistock, Managing Partner**
- **Lynas Vokes Investments Ltd, Managing Director**
- **M&G Wealth, Proposition Manager**
- **M&G Wealth, Wealth Graduate**
- **Mattioli Woods Plc, Managing Director - Business Development & Marketing**
- **Money and Pensions Service, Policy & Propositions Manager**

- **My Time Pension**, *Co Founder and CEO of My Time*
- **MWA Financial**, *Partner Private Wealth*
- **New Leaf Distribution**, *Paraplanner*
- **Nicholls Stevens (Financial Services) Limited**, *Managing Director*
- **Oakfield Financial Services Limited**, *Paraplanner*
- **Octopus Money**, *Head of Digital Retirement*
- **Paradigm Norton Financial Planning Ltd**, *Head of Technical*
- **Parmenion Capital Partners LLP**, *Intermediary Distribution Director*
- **Pennymatters Limited**, *Independent Financial Adviser*
- **Pharon Independent Financial Advisers Limited**, *Paraplanner*
- **Phoenix Life Limited**, *Head of Retirement Propositions*
- **Pi Financial Ltd**, *Business and Development Director*
- **Rathbones Group Plc**, *Senior Paraplanning Lead*
- **Rathbones Group Plc**, *Director of Propositions & Service Experience*
- **RBC Brewin Dolphin Limited**, *Planner - Wealth Planning*
- **RSMR**, *Director*
- **Salisbury Financial Services Limited**, *Chartered Financial Planner*
- **Saltus Financial Planning Limited**, *Partner & Regional Director*
- **Shackleton Advisers**, *Head of Adviser Proposition, Panel and Processes*
- **Simpson Wood (Financial Services) Limited**, *Compliance & Operations Director*
- **Strategic Solutions Financial Services**, *Partner & Chartered Financial Planner*
- **Tavistock Investments Plc**, *Corporate Development Director*
- **The Penny Group London LLP**, *Client Service & Paraplanner Manager*
- **The Superbia Group**, *Head of Financial Planning*
- **Timothy James and Partners Ltd**, *Director*
- **Timothy James and Partners Ltd**, *Financial Adviser*
- **Timothy James and Partners Ltd**, *Director*
- **Titan Wealth Planning**, *Head of Proposition*
- **True Potential Wealth Management LLP**, *Wealth Management Partner*
- **Walden Capital**, *Director*
- **Wealth Wizards**, *Head of Personal Advice*
- **Wesleyan Financial Services Ltd**,
- **Which?**, *Partnerships Manager*
- **Wise Investment**, *Head of Paraplanning*
- **Wren Sterling Financial Planning Limited**, *Head of Research*