

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*

This list is copyright of the Owen James Group and its contents must be kept confidential and may not be passed to any third party for any purpose

- **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*