

Participant List

- **Aberdeen**, *Chief Operating Officer, Adviser*
- **Advanta Wealth Ltd**, *Chief Commercial Officer*
- **Advanta Wealth Ltd**, *Client Director*
- **Advanta Wealth Ltd**, *Regional Director (Dundee)*
- **Armstrong Watson Financial Planning Limited**, *Chief Executive Officer*
- **Aspire Wealth Management Ltd**, *Director*
- **Aviva**, *Head of Adviser Platform*
- **Benchmark Capital**, *Commercial Director*
- **Cairn Independent Ltd**, *Operations Director*
- **Carbon Financial Partners Ltd**, *Managing Director*
- **Charles Stanley & Co Ltd**, *Managing Director - Charles Stanley Central Financial Services & Chief Client Officer*
- **Clark Gillone A/R Finli Group**, *Director*
- **Corbel Partners**, *Non-Executive Director*
- **Finli Group**, *Regional Director - Scotland*
- **Hargreaves Lansdown Asset Management Limited**, *Financial Advice Director*
- **Henderson Stone & Co Ltd A/R Quilter**, *Director*
- **Irwin Mitchell Asset Management A/R Shackleton**, *Head of Growth*
- **New Leaf Distribution**, *Principal & Founder*
- **North Capital Management Limited**, *Chief Executive Officer*
- **One Four Nine Group**, *Chief Executive Officer*
- **Rathbones Group Plc**, *Proposition Director*
- **Sesame Bankhall Group**, *Chair*
- **Sesame Bankhall Group**, *Strategic Relationship Manager - Wealth*
- **Tweed Wealth Management Ltd A/R SJP**, *CEO & Chartered Financial Planner*

FACILITATORS & SPEAKERS

- **Catalyst Partners**, *Consultant*