

Sponsors

blueprism®

UDelio

FACTSET

moneyfarm

moneyinfo

REDINGTON

TITANBAY

WEALTH
DYNAMIX

Participant List

The Delegates

Wealth Management and Private Banking

- **Aberdeen Standard Capital (ASC)** - Head of Operations, Technology & Change
- **Aberdeen Standard Capital (ASC)** - Head of Client Service
- **Artorius Wealth Ltd** - Chief Operating Officer
- **Bank J. Safra Sarasin (Gibraltar) Ltd** - Head of Change
- **Bordier & Cie** - Head of Operations
- **Brown Shipley & Co Ltd** - Chief Operating Officer
- **Canaccord Genuity Wealth Management** - Group Chief Operating Officer
- **Cazenove Capital Management Ltd** - Department Head, Wealth Management Operations
- **EFG Private Bank Ltd** - Chief Operating Officer
- **EFG Private Bank Ltd** - Private Banking Chief Operating Officer
- **James Hambro & Partners** - Partner
- **James Hambro & Partners** - Chief Operations Officer - Investments
- **Julius Baer International Ltd** - COO and CFO
- **Killik & Co** - Partner, Chief Marketing Officer
- **M&G Corporate Services Limited** - Head of Digital Strategy
- **MASECO Private Wealth** - Partner, Chief Operating Officer
- **Rathbone Brothers Plc** - Chief Operating Officer
- **RBC Wealth Management International** - Senior Director of Wealth Management A.I. Applied Analytics and Innovation
- **Saltus Partners LLP** - Chief Operating Officer
- **Saranac Partners Ltd** - Chief Operating Officer
- **Sarasin & Partners LLP** - Chief Operating Officer
- **SG Kleinwort Hambros Bank Ltd** - Chief Operating Officer
- **Shard Capital** - Chief Operating Officer
- **St. James's Place Wealth Management Group** - Regional Director Head of Acquisition

- **Tideway Investment Partners LLP** - Chief Operating Officer
- **Tyndall Investment Management** - Chief Operating Officer
- **Waverton Investment Management Ltd** - Chief Operating Officer
- **Waverton Investment Management Ltd** - Chief Information Officer
- **WH Ireland** - Strategy and Change Director
- **Whitefoord LLP** - Partner, Chief Operating Officer

Advisory Distributors

- **Attivo Group** - System Analyst & iO Lead Technology Officer
- **Beaufort Group** - Chief Operating Officer
- **Grosvenor Wealth Management Ltd** - Director
- **Hargreaves Lansdown Group** - Head of Advisory Operations
- **LEBC Group** - Group Director of Operations
- **Mattioli Woods Plc** - Business Development Director
- **PI Investment Management** - Head of Business Development
- **Sandringham Financial Partners** - Chief Technology Officer
- **Saunderson House** - Head of Information Technology
- **Saunderson House** - Head of Change
- **Succession Wealth** - Managing Director
- **Tavistock Investments Plc** - Managing Director
- **Tenet Group** - Director of Strategic Development
- **The Fry Group** - Chief Operations Officer
- **threesixty services LLP** - Head of Discretionary Management Relationships
- **Wealth Holdings** - Director & Head of Integration

The Sponsors

- **Blue Prism** - Global Financial Services Lead, Product Marketing
- **Blue Prism** - Senior Account Director and Head of Wealth Management Solutions, UK&I
- **Delio Ltd** - Co-Founder & Chief Commercial Officer
- **FactSet** - Vice President, Director of Market Development
- **Moneyfarm** - Business Development Manager
- **moneyinfo Ltd** - Business Development Director
- **moneyinfo Ltd** - Operations Director
- **Ortec Finance** - Iwan Schafthuizen, Managing Director Business Development
- **Redington** - Managing Director, ADA
- **Redington** - Director Business Development
- **Titanbay Ltd** - Managing Director of Investor Relations
- **Wealth Dynamix** - MD – UK and Americas
- **Wealth Dynamix** - Marketing Director

The Thought Leaders

- **Aon Client Insight** - Head of UK/Europe, Client Insight
- **Aon Client Insight** - Director
- **Esperanto Business Solutions** - Founder
- **Google UK Ltd** – Managing Director, Financial Services & Service Industries
- **Institute of Fiscal Studies** - Director
- **Raisin UK** - Co-Founder

- **Silverback Consultancy** - Founder
- **The Wealth Mosaic** - Co-founder - Head of Marketplace & Content