# WEALTHIECH MATTERS

WealthTech Matters - The Client 2022

Thursday 10 March 2022, Royal College of Physicians, 11 St Andrews Place, Regents Park, London NW1 4LE

#### **Sponsors**









Dorsum

## **Participant List**

### **ADVISORY DISTRIBUTORS**

- Abrdn, Chief Operating Officer, Adviser
- Attivo Group, System Analyst & iO Lead Technology Officer
- Charles Stanley Pic, Digital Project Manager
- Charles Stanley Plc, Head of Digital
- Group IFA, Group CEO
- Isio, Director- Wealth Strategy
- JustFA, Acquisitions Director
- Mattioli Woods Plc, Business Development Director
- Mattioli Woods Plc, Chief Information Officer
- Mattioli Woods Plc, Wealth Management Consultant
- Origen Financial Services, Proposition Manager
- Progeny Group, Chief Technology Officer
- Quilter Financial Planning, Business Development Director
- Tavistock Investments PIc, Managing Director
- Tenet Group, Director of Strategic Development
- Tenet Group, Group MD
- Tenet Group, Managing Director Tenet Compliance Services
- Threesixty services LLP, Head of Strategic Accounts
- VouchedFor, Chief Operating Officer

#### WINNING ADVISERS

- CMS Financial Management Limited, Chief Operating Officer
- Casterbridge Wealth Ltd, Managing Director & Head of Distribution
- Grosvenor Wealth Management Ltd, Director
- P1 Investment Management, Head of Business Development

#### **PRIVATE BANKERS & WEALTH MANAGERS**

- Aberdeen Standard Capital (ASC), Head of Operations, Technology & Change
- Artorius Wealth Ltd, IT Manager
- Bank J. Safra Sarasin (Gibraltar) Ltd, Head of Change
- Bordier & Cie, Head of Operations
- Britannia Financial Group, Relationship Manager
- Brown Shipley & Co Ltd, Head of IT
- Church House Investment Management, Distribution & Marketing Director
- Cooper Parry Wealth, Chief Growth Officer
- Coutts & Co, COO Private Banking
- Coutts & Co, Chief Operating Officer
- Credo Group UK Ltd, Head of Operations
- Holden & Partners LLP, Director of Operations
- Independent Consultant, Independent Consultant
- Independent Consultant, Independent Consultant
- Independent, Former CFO and COO
- J. Stern & Co LLP, COO & Managing Partner
- James Hambro & Partners, Chief Operations Officer Investments
- James Hambro & Partners, Partner
- Julius Baer International Ltd, Senior Project Manager
- Kleinwort Hambros, Group Chief Operating Officer
- Kleinwort Hambros, Head of Business Management
- Lincoln Private Investment Office, Chief Operating Officer
- London & Capital, Chief Operating Officer
- MASECO Private Wealth, Partner, Chief Operating Officer
- Saltus Partners LLP, Chief Operating Officer
- Saltus Partners LLP, Chief Technology Officer
- Saranac Partners Ltd, Chief Operating Officer
- Shard Capital, Chief Operating Officer
- Shard Capital, Head of Sales & Business Development

- St. James's Place Wealth Management Group, Head of Division Strategy & Change
- Tideway Investment Partners LLP, Chief Operating Officer
- Tilney Smith & Williamson, Chief Operating Officer
- Tilney Smith & Williamson, Digital Product Lead
- Waverton Investment Management Ltd, Chief Operating Officer
- Waverton Investment Management Ltd, Chief Technology Officer
- Wealth Wizards, Chief Strategy Officer

#### **SPEAKERS**

- Dorsum IT Solutions, Head of Product Wealth Portal
- GDR Creative Intelligence, Strategy Director

#### **SPONSORS & EXPERTS**

- ALT/AVE, CEO & Founder
- ALT/AVE, Head of Sales
- Allfunds, UK Regional Sales Manager for Digital
- Blue Prism, Head of Research and Al
- Blue Prism, Head of Wealth and Asset Management Solutions, UK&I
- Dorsum IT Solutions, Sales Director
- EV, Chief Commercial Officer
- EV, Senior Business Development Manager
- SS&C Advent, Senior Director, Asset & Wealth Management
- SS&C Advent, Senior Director
- Titanbay Ltd, Chief Commercial Officer
- Titanbay Ltd, Managing Director, Partnerships
- Wealth Dynamix, Commercial Director UK, Middle East & US
- Wealth Dynamix, Head of Pre-Sales

#### INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

• Ammonite, Co-Founder & Director