

# WEALTHTECH MATTERS

WealthTech Matters - Autumn 2025

Thursday 6 November 2025, SEI Investments, 14-18 Finsbury Square, London EC2A 1BR

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- **2 Plan Wealth Management**, *Head of Technology*
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- **Artorius Wealth**, *Applications and Systems Manager*
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- **Charles Stanley & Co**, *Head of Digital Platform*
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- **Forvis Mazars Financial Planning**, *Operations Associate Director*

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- **Forvis Mazars Financial Planning**, *Operations Director, Private Client – Financial Planning*
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- **Holden & Partners**, *Director of Operations*
- **Hurst Point Group**, *Chief Technology & Transformation Officer*
- **Irwin Mitchell**, *Head of Transformation & IT Services*
- **Isio Wealth Planning**, *Consultant*
- **James Hambro & Partners**, *Chief Operating Officer*
- **James Hambro & Partners**, *Partner*
- **Killik & Co**, *Project Manager*
- **Kingswood**, *Project Analyst*
- **Lockhart Capital Management**, *Head of Client Advice*
- **MKC Wealth**, *Chief Technology Officer*
- **Parmenion Capital Partners**, *Chief Commercial Officer*
- **Parmenion Capital Partners**, *Commercial Director*
- **Parmenion Capital Partners**, *Head of Product (Platform)*
- **Pembroke Financial Services**, *Head of Advice Proposition*
- **Pembroke Financial Services**, *M&A and Technology*
- **Perspective Financial Group**, *Chief Operating Officer*
- **Radiant Financial Planning**, *Head of Operations*
- **Rothschild & Co**, *Head of Client Account Management*
- **Ruffer**, *Technology Lead Software Engineer*
- **SG Kleinwort Hambros Bank**, *Chief Information Technology Officer*
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- **Sesame Bankhall Group**, *Chief Operating Officer*
- **Sesame Bankhall Group**, *Enterprise Architect*
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- **Tavistock Investments**, *Corporate Development Director*
- **Thomson Tyndall**, *Financial Advice Investment Management*
- **Thomson Tyndall**, *Financial Adviser*
- **TrinityBridge Formerly Close Brothers Asset Management**, *Chief Digital & Information Officer*
- **Validpath**, *Chief Technology Officer*

## **FACILITATORS & SPEAKERS**

- **JoyndUp**, *Director*
- **Keynote Speaker**, *Founder at Boxlight*
- **Silverback Consultancy**, *Senior Business Development Manager*

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

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- **Platforum**, *Head of Platforum*