

Participant List

- **BBVA Mexico (subsidiary of BBVA Group), Investment Specialists**
- **Brown Advisory, Head of International Operations**
- **Brown Shipley & Co Limited, Chief Operating Officer**
- **Burlington Associates Ltd, Managing Director**
- **Cadro, Head of Operations**
- **Charles Stanley & Co Ltd, Head of Digital Platform**
- **Charles Stanley & Co Ltd, Product Manager**
- **Clifton Asset Management PLC, Head of Client Experience and Communications**
- **Crowe Financial Planning UK Limited, Operations Director**
- **Defaqto Ltd., Strategic Accounts Director**
- **Franklyn Financial Management Ltd A/R SJP, Chief Operating Officer**
- **Goalkeep, Managing Director**
- **Holden & Partners LLP, Director of Operations**
- **HSBC Bank Plc, Senior Customer Journey Lead - Build Investments & Financial Planning**
- **Independent Consultant, former Head of Advice Proposition**
- **Isio Wealth Planning, Chief Operating Officer**
- **James Hambro & Partners LLP, Chief Operating Officer**
- **Killik & Co, Senior Product Manager**
- **Lockhart Capital Management LLP, Head of Client Advice**
- **MKC Wealth Ltd, IT Manager**
- **Parmenion Capital Partners LLP, Intermediary Distribution Director**
- **Quilter plc, Commercial Director**
- **Salisbury House Limited A/R Openwork, Operations Director**
- **Sesame Bankhall Group, Distribution Director**
- **Tavistock Investments Plc, Corporate Development Director**
- **Tideway Investment Partners LLP, Operations Director**
- **Time to Give Network, Chief Executive Officer**
- **Timothy James and Partners Ltd, Head of Advice Delivery**

Industry Bodies, Regulators, Associations & Guests

- **Ammonite Wealth Ltd, Co-Founder & Director**
- **Ammonite Wealth Ltd, Co-Founder & Director**