WEALTHTECH MATTERS

WealthTech Matters - Autumn 2026
Thursday 8 October 2026, SEI Investments Offices, Alphabeta Building, 14-18 Finsbury Square, London, EC2A 1BR

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Participant List

- **7IM Investment and Retirement Solutions Limited,** *Managing Director, Corporate & Strategy Development*
- **Advanta Wealth Ltd,** *Chief Operating Officer*
- **Amber River,** *Head of Group Change*
- **Arbuthnot Latham & Co Ltd,** *Chief Platform Officer*
- **Ark Investment Management,** *Chief Executive Officer & Head of Investor Relations*
- **Artorius Wealth Ltd,** *Applications and Systems Manager*
- **Artorius Wealth Ltd,** *IT Manager*
- **Atomos,** *Head of Strategy*
- **Attivo Group,** *Head of Operations and Strategic Relationships*
- **Attivo Group,** *Operations Director*
- **Bank J. Safra Sarasin Ltd,** *Relationship Manager*
- **BBVA Mexico (subsidiary of BBVA Group),** *Investment Specialists*
- **Beckett Investment Management,** *Operations Director*
- **Benchmark Capital,** *Head of Digital Advice*
- **Benchmark Capital,** *Head of Business Operations*
- **Brown Advisory,** *Business Strategist*
- **Brown Advisory,** *Head of International Operations*
- **Cadro,** *Head of Operations*
- **Crowe Financial Planning UK Limited,** *Operations Director*
- **Fairstone Group,** *Chief Operating Officer*
- **Fidelius,** *Head of Advice Delivery*

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- **Finli Group,** *Transformation Director*
- **Five Wealth Ltd A/R Sense Network,** *Chief Operating Officer*
- **Forvis Mazars Financial Planning Limited,** *Operations Director, Private Client – Financial Planning*
- **Goalkeep,** *Managing Director*
- **Hargreaves Lansdown Asset Management Limited,** *Head of Advisory Proposition*
- **Holden & Partners LLP,** *Director of Operations*
- **HSBC Bank Plc,** *Financial Planning Process & Procedures Lead*
- **HSBC Bank Plc,** *Global Senior Manager Financial Planning*
- **Hymans Robertson LLP,** *Head of Corporate, Personal Wealth*
- **Independent,** *Chief Technology Officer*
- **Independent,** *Was Executive Director @ UBS Wealth Management*
- **Independent Consultant,** *Corporate Development Director*
- **Isio Wealth Planning,** *Chief Digital Officer*
- **James Hambro & Partners LLP,** *Chief Operating Officer*
- **James Hambro & Partners LLP,** *Partner*
- **JM Finn & Co Ltd,** *Chief Operating Officer*
- **Julius Baer International Ltd,** *Head of Middle Office*
- **Julius Baer International Ltd,** *Executive Director, Head of Client Experience*
- **Killik & Co,** *CRM Product Manager*
- **Killik & Co,** *Project Manager*
- **Knights PLC,** *Managing Director Wealth Planning*
- **Lincoln Private Investment Office,** *Chief Operating Officer*
- **Lloyds Banking Group,** *Head of New Initiatives Embedded Finance*
- **Lombard Odier,** *Banking Platform Services Client Relationship Manager*
- **Lombard Odier Investment Managers,** *Head of Technology for Banking Infrastructure, UK*
- **M&G Wealth,** *Proposition Manager*
- **Oberon Investments Limited,** *Senior Business Manager*
- **One Financial Solutions Ltd A/R 2Plan,** *Operations Director*
- **One Four Nine Group,** *Chief Operating Officer*
- **Quanta Group,** *Group Chief Operating Officer*
- **Radiant Financial Planning Limited,** *Head of Operations*
- **Raymond James Wealth Management,** *Managing Director, Central Financial Services & Chief Client Officer*
- **Sesame Bankhall Group,** *Enterprise Architect*
- **Shackleton Advisers,** *Chief Operating Officer & Head of Technology*
- **Shackleton Advisers,** *Head of Transformation (IMAML)*
- **Shackleton Advisers,** *Head of Advice Process and Proposition*
- **Succession Wealth,** *Chief Operating Officer*
- **The First MicroFinanceBank - Afghanistan,** *Member - Board of Supervisors*
- **The Openwork Partnership,** *Senior Operations and Performance Manager*
- **The Penny Group LLP,** *Client Services Director*
- **Tideway Wealth,** *Operations Director*
- **Tribe Impact Capital LLP,** *Head of Operations*
- **Union Bancaire Privée (UK) Ltd (Formerly SG Kleinwort Hambros Bank Limited),** *Chief Information Technology Officer*
- **Wealth Wizards,** *Senior Financial Planning Consultant*

Sponsors & Experts

- **additiv,** *Head of UK*
- **AdvisoryAI,** *Senior Manager*
- **AdvisoryAI,** *Co-founder & CEO*
- **AM Insights,** *Founder & CEO*

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- **Ammonite AI,** *Director*
- **Ammonite AI,** *Director*
- **Benchmark Capital,** *Senior Business Development Consultant*
- **Benchmark Capital,** *Product Manager*
- **Benchmark Capital,** *Head of Business Development*
- **Dynamic Planner,** *Business Development Director*
- **Dynamic Planner,** *Principal Solutions Consultant*
- **Dynamic Planner,** *Senior Business Development Executive*
- **FA Solutions UK,** *Chief Revenue Officer*
- **FA Solutions UK,** *Senior Sales Engineer*
- **FA Solutions UK,** *Senior Sales Director*
- **FoxTech Cyber,** *CEO*
- **Model Office-MO®,** *Enterprise sales executive*
- **Model Office-MO®,** *CEO and Founder*
- **Model Office-MO®,** *Client relationship executive*
- **Moneyinfo,** *Founder & Managing Director*
- **Moneyinfo,** *Founder & Business Development Director*
- **Oxford Risk,** *Head of Behavioural Finance*
- **Oxford Risk,** *Head of UK Business*
- **SEI,** *Head of UK Sales, PB and WM*
- **SEI,** *Sales Director*
- **SEI Investments Europe Ltd,** *Head of SEI Sphere*
- **SEI Investments Europe Ltd,** *Chief Technology Officer, SEI Sphere*
- **Unbiased,** *Managing Director*
- **Unbiased,** *Enterprise Sales Manager*

Facilitators & Speakers

- **Alpha FMC,** *Senior Manager*
- **Common Sense Implementations Ltd.,** *Founder And Director*
- **Independent Consultant,** *Independent Consultant*
- **JoyndUp Ltd,** *Director*
- **Melo (Change Squared/Exit Partnership/Aspire Exec Merged),** *Chief Operating Officer*
- **Mint Blue Consulting Ltd,** *Owner and Director*
- **Ocorian (UK) Limited,** *Consulting Lead*
- **Opus Una,** *MD*
- **Woven Advice,** *Co-Founder*

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