

WEALTHTECH MATTERS

**Thursday 8 October 2026, SEI Investments Offices,
AlphaBeta Building, 14-18 Finsbury Square, London, EC2A 1BR**

Delegates

- **7IM Investment and Retirement Solutions Limited**, *Corporate & Strategy Development Manager*
- **Adsumus Financial Services**, *Practice Manager*
- **Adsumus Financial Services**, *Senior Paraplanner*
- **Amber River**, *Chief Operating Officer*
- **Amber River**, *Head of Group Change*
- **Arbuthnot Latham & Co Ltd**, *Chief Platform Officer*
- **Attivo Group**, *Head of Operations and Strategic Relationships*
- **BBVA Mexico (subsidiary of BBVA Group)**, *Investment Specialists*
- **Cadro**, *Head of Operations*
- **Crowe Financial Planning UK Limited**, *Operations Director*
- **Fairstone Group**, *Chief Operating Officer*
- **Fideliis**, *Head of Advice Delivery*
- **Fideliis**, *Chief Executive Officer*
- **Finli Group**, *Transformation Director*
- **Five Wealth Ltd A/R Sense Network**, *Chief Operating Officer*
- **GFT Group**, *Client Partner - Capital Markets*
- **Goalistic**, *Managing Director*
- **Hargreaves Lansdown Asset Management Limited**, *Head of Advisory Proposition*
- **Holden & Partners LLP**, *Director of Operations*
- **HSBC Bank Plc**, *Global Senior Manager Financial Planning*
- **Hymans Robertson LLP**, *Head of Corporate, Personal Wealth*
- **Independant**, *Independant*
- **Independent**, *former Chief Technology Officer - Raymond James*
- **Independent Consultant**, *Partner*
- **Independent Consultant**, *Senior Investment Adviser*
- **Independent Consultant**, *Consultant*
- **James Hambro & Partners LLP**, *Partner*
- **James Hambro & Partners LLP**, *Chief Operating Officer*
- **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**, *Adviser Product Manager*
- **Knights PLC**, *Managing Director Wealth Planning*
- **Lincoln Private Investment Office**, *Chief Operating Officer*
- **Lombard Odier & Cie**, *Banking Platform Services Client Relationship Manager*
- **Lombard Odier & Cie**, *Banking Platform Services Client Relationship Manager*

Delegates

- **M&G Wealth**, *Proposition Manager*
- **Niche Private Clients**, *Director*
- **Oberon Investments Limited**, *Senior Business Manager*
- **One Four Nine Group**, *Chief Operating Officer*
- **Origen Financial Services**, *Chief Operating Officer*
- **Radiant Financial Planning Limited**, *Head of Operations*
- **Raymond James (was Charles Stanley & Co Ltd)**, *Product Manager*
- **Raymond James Wealth Management**, *Managing Director, Central Financial Services & Chief Client Officer*
- **Shackleton Advisers**, *Head of Advice Process and Proposition*
- **Shackleton Advisers**, *Head of Transformation and IT Services - IM Asset Management*
- **Succession Wealth**, *Head of IT Systems*
- **The First MicroFinanceBank - Afghanistan**, *Member - Board of Supervisors*
- **Tideway Wealth**, *Operations Director*
- **Tribe Impact Capital LLP**, *Head of Operations*
- **Union Bancaire Privée (UK) Ltd (Formerly SG Kleinwort Hambros Bank Limited)**, *Group Chief Operating Officer*
- **Warden Consulting**, *Founder*

Sponsors & Experts

- **AdvisoryAI**, *Senior Manager*
- **AdvisoryAI**, *Co-founder & CEO*
- **AM Insights**, *Founder & CEO*
- **AM Insights**, *Sales Executive*
- **Ammonite AI**, *Director*
- **Ammonite AI**, *Director*
- **Benchmark Capital**, *Head of Digital Strategy & Transformation*
- **Benchmark Capital**, *Senior Business Development Consultant*
- **Benchmark Capital**, *Head of Business Development*
- **Delta Capita - Financial Markets Consulting**, *Head of Client Lifecycle Management Sales*
- **Delta Capita - Financial Markets Consulting**, *Head of Partnerships - CLM*
- **Dynamic Planner**, *Senior Business Development Executive*
- **Dynamic Planner**, *Business Development Director*
- **Dynamic Planner**, *Principal Solutions Consultant*
- **FA Solutions UK**, *Chief Revenue Officer*
- **FA Solutions UK**, *Senior Sales Director*
- **FA Solutions UK**, *Senior Sales Engineer*
- **FoxTech Cyber**, *CEO*
- **FoxTech Cyber**, *Client Success*
- **Lumisi**, *Client Services Director*
- **Model Office-MO®**, *Enterprise sales executive*
- **Model Office-MO®**, *Client relationship executive*
- **Model Office-MO®**, *CEO and Founder*
- **Moneyinfo**, *Founder & Business Development Director*
- **Moneyinfo**, *Founder & Managing Director*
- **Octo Members Group**, *Managing Director and Founder*
- **Origo Services Limited**, *FinTech Adoption Specialist*
- **Oxford Risk**, *Head of UK Business*
- **Oxford Risk**, *Head of Behavioural Finance*
- **SEI**, *Sales Director*

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Sponsors & Experts

- **SEI Investments Europe Ltd**, *Head of SEI Sphere*
- **SEI Investments Europe Ltd**, *Chief Technology Officer, SEI Sphere*
- **Solve Partners**, *Partner*
- **Unbiased**, *Chief Revenue Officer*
- **Unbiased**, *Managing Director*
- **Unbiased**, *Enterprise Sales Manager*

Facilitators & Speakers

- **Keynote Speaker**, *Professor in Practice for AI and Technologies, Founder of AI Governance Limited & Former CEO & Board Chair Driving Responsible AI Leadership*
- **Mint Blue Consulting Ltd**, *Owner and Director*
- **Ocorian (UK) Limited**, *Consulting Lead*
- **Opus Una**, *MD*
- **Pillar Client Services**, *Founder*
- **Pivot Strategies Ltd**, *Co-Founder*
- **Pivot Strategies Ltd**, *Managing Director*
- **SEI**, *Head of International Marketing*
- **Solve Partners**, *Principal Consultant*
- **Wipro**, *Global Consultancy Lead - Wealth AI Transformation*
- **Woven Advice**, *Co-Founder*