

Sponsors



Participant List

- **Advisa Group**, *Director*
- **Advisa Group**, *Director*
- **Aim Independent Ltd**, *Managing Director*
- **Arch Financial Planning Limited**, *Director*
- **Atwoods Ltd**, *Managing Director*
- **Birchwood Investment Management Ltd**, *Chairman*
- **Blackstone Moregate Ltd**, *Director*
- **Bournemouth Investments Ltd**, *Director*
- **Burlington Associates Ltd**, *Managing Director*
- **CBW Financial Planning Ltd**, *Managing Director*
- **Campbell Munro Ltd**, *Managing Director*
- **Chantler Kent Investments**, *Director*
- **Chiltern Consultancy Ltd**, *Managing Director*
- **Chiltern Consultancy Ltd**, *Managing Director*
- **Chris Leach & Associates Ltd**, *Managing Director*
- **Churchs Financial Planning**, *Managing Director*
- **Clairville York**, *Director*
- **Clairville York**, *Managing Director*

- **Clifton Asset Management PLC**, *Group Financial Planning & Business Development Director*
- **Collingbourne Wealth Management Ltd**, *Director*
- **Cube Financial Planning**, *Director*
- **Dartington Wealth Management**, *Managing Director*
- **David Booter & Co**, *Partner*
- **Dawn Slater Wealth Management**, *Director*
- **Ergowealth Ltd**, *Chief Executive Officer*
- **Executive Advisory Services Limited**, *Chairman*
- **Executive Advisory Services Limited**, *Director*
- **Fiducia Wealth Management Limited**, *Executive Chairman*
- **Fiveways Financial Planning Ltd**, *Director*
- **GWM Asset Management**, *Head of Strategy and Risk Management*
- **Generation Financial Services Ltd**, *Director*
- **Generation Financial Services Ltd**, *Director*
- **Grosvenor Wealth Management Ltd**, *Director*
- **HB Dobbin Financial Planning**, *Director*
- **HFS Milbourne Financial Services**, *Managing Director*
- **Headley Financial Services Ltd**, *Director*
- **Headley Financial Services Ltd**, *Managing Director*
- **Hearnden Associates Limited**, *Director*
- **Holden & Partners LLP**, *Partner*
- **Independent**, *Financial Planner*
- **Jigsaw Compliance Services**, *Compliance Consultant*
- **John Lamb LLP**, *Head of Investments*
- **Kreston Reeves Financial Planning Ltd**, *Partner and Director*
- **Lewis Innovative Investment**, *Managing Director*
- **Lifetime Wealth Management Ltd**, *CEO*
- **Lucas Fettes & Partners (Financial Services) Ltd**, *Director*
- **MAP Financial Limited**, *Managing Director*
- **Matthew Douglas Ltd**, *Director*
- **Mclaren Capital**, *Managing Director*
- **Montfort International Ltd**, *Principal*
- **Navigator Financial Planning**, *Managing Director*
- **Nicholls Stevens Financial Services**, *Managing Director*
- **Old Mill Financial Planning LLP**, *Director*
- **Orchard House (IFAs) Ltd**, *Financial Director*
- **Orchard House (IFAs) Ltd**, *Managing Director*

- **Paul Young IFA**, *Managing Director*
- **Premier Financial Management Ltd**, *Director*
- **Regency Investment Services Ltd**, *Director*
- **Skerritts Wealth Management**, *Business Development Manager*
- **Spectrum Financial Services Ltd**, *Managing Director*
- **Succession Group Ltd.**, *Financial Wealth Planner*
- **TaylorMade Financial Planning LLP**, *Managing Partner*
- **Thomson Tyndall**, *Partner*
- **Walden Capital**, *CEO*
- **Walden Capital**, *Director*
- **Wardour Financial Planners Ltd**, *Director*
- **Wardour Financial Planners Ltd**, *IFA*
- **Wingate Financial Planning**, *Managing Director*
- **Wise Investment**, *Senior Financial Planner*
- **Zen Wealth LLP**, *Managing Partner*

SPONSORS & EXPERTS

- **BNY Mellon Asset Management**, *Business Development Manager*
- **BNY Mellon Asset Management**, *Head of UK & Ireland Sales*
- **Benchmark Capital**, *Corporate Development Director*
- **Benchmark Capital**, *Head of Investment Solutions*
- **Dimensional Fund Advisors Ltd**, *Regional Director*
- **Dimensional Fund Advisors Ltd**, *Vice President*
- **Goji**, *Chief Executive Officer*
- **Goji**, *Head of Distribution*
- **Hearthstone Investments Plc**, *Business Development Manager*
- **Hearthstone Investments Plc**, *CEO*
- **Nucleus Financial Services**, *Business Development Director*
- **Nucleus Financial Services**, *Regional Business Development Manager (London)*
- **Orbis Investments (U.K.) Ltd**, *Business Development Manager South West*
- **Orbis Investments (U.K.) Ltd**, *Head of UK Retail*
- **Tatton Investment Management**, *Business Development Director*
- **Tatton Investment Management**, *Business Development Director*
- **Tatton Investment Management**, *Sales Director*
- **Vanguard**, *Investment Strategist*
- **Vanguard**, *Strategic Account Manager*

FACILITATORS & SPEAKERS

- **Independent Consultant**, *Consultant*
- **Independent**, *Sleep Evangelist & NHS Innovation Accelerator Fellow*
- **Intrapreneur International**, *CEO*
- **LEBC Group**, *Group HR Manager*
- **MAD Consulting**, *Managing Director, UK Private Client Services*
- **Owen James Group**, *Consultant*
- **Rennison Consulting Ltd**, *Director*
- **Richard Parkin Consulting**, *Managing Director*
- **Silverback Consulting**, *Founder*
- **The Trusted Executive Foundation**, *Managing Director*
- **Wealth Wizards**, *Business Development Director*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Chartered Institute for Securities & Investment**, *Head of Financial Planning*
- **Financial Conduct Authority**, *Retail Investments Supervision*
- **PIMFA**, *Senior Policy Adviser for Public Policy*
- **Unbiased Financial Group LLP**, *Chartered Wealth Manager*