

Sponsor



Participant List

- **Adsumus Financial Services**, *Head of Operations & Paraplanning Partner*
- **Ajax Wealth Management Limited**, *Paraplanner*
- **Apropos Wealth Management Ltd**, *Chartered Financial Planner*
- **Baker Gladstone & York Ltd**, *Paraplanner*
- **Blackstone Moregate Ltd**, *Chief Executive Officer*
- **Brewin Dolphin Limited**, *Planner - Wealth Planning*
- **Broom Consultants Ltd**, *Senior Paraplanner*
- **Broom Consultants Ltd**, *Trainee Financial Administrator*
- **Canaccord Genuity Financial Planning Limited**, *Senior Paraplanner*
- **Cavendish Medical Ltd**, *Senior Assistant Financial Planner*
- **Church's Financial Planning**, *Administrator*
- **Church's Financial Planning**, *Trainee Planner*
- **City Asset Management Plc**, *Chartered Financial Planner*
- **City Asset Management Plc**, *Paraplanner*
- **Clairville York - acquired by Independent Wealth Planners**, *Chartered Financial Planner & Paraplanning Manager*
- **Clairville York Limited**, *Financial Planner*
- **Clark Gillone**, *Paraplanner*
- **Close Brothers Asset Management**, *Paraplanner*
- **Close Brothers Asset Management**, *Technical Adviser*
- **Emery Little Wealth Management Limited**, *Paraplanner*
- **Emery Little Wealth Management Limited**, *Paraplanning Team Leader*
- **Evelyn Partners**, *Business Development Manager*
- **Evelyn Partners**, *Relationship Manager*

- **FLP Group Ltd**, *Financial Planner*
- **FLP Group Ltd**, *Paraplanner*
- **Fairstone Financial Management Ltd**, *Paraplanner*
- **Fiducia Wealth Management Limited**, *Senior Paraplanner*
- **Foster Denovo**, *Paraplanner*
- **Gerrard Stuart Financial Services Limited**, *Senior Paraplanner*
- **Goodman Chartered Financial Planners**, *Paraplanner*
- **Goodman Chartered Financial Planners**, *Paraplanner*
- **H V Financial Planning Ltd**, *Paraplanner*
- **HFMC Wealth Partners LLP**, *Chartered Financial Planner and Senior Technical Consultant*
- **HFMC Wealth Partners LLP**, *Senior Private Client Administrator*
- **HFMC Wealth Partners LLP**, *Senior Technical Consultant*
- **Handelsbanken Wealth Management**, *Head of Wealth Planning*
- **Holden & Partners LLP**, *Paraplanning Manager*
- **Hughes & Co**, *Outsourced Paraplanner*
- **Independent**, *Paraplanner*
- **Informed Choice Ltd**, *Head of Paraplanning*
- **Investec Wealth & Investment Limited**, *Associate Financial Planner*
- **JM Finn & Co Ltd**, *Paraplanner*
- **King Financial Planning - AR of Tavistock**, *Paraplanner*
- **New Leaf Distribution**, *Head of IFA Supervision*
- **New Leaf Distribution**, *Investment Director*
- **New Leaf Distribution**, *Paraplanner*
- **New Leaf Distribution**, *Trainee Paraplanner*
- **OCM Wealth Management**, *Senior Paraplanner*
- **Progeny Wealth Limited**, *Paraplanner*
- **Quilter plc**, *Head of Adviser & Client Support*
- **Quilter plc**, *Paraplanner*
- **Quilter plc**, *Paraplanning Operations Manager*
- **Rathbones Group Plc**, *Head of Paraplanning*
- **Raymond James Investment Services Ltd**, *Senior Paraplanner*
- **Regentia Lifestyle Planning Limited**, *Paraplanner and Administrator*
- **Regis Bentley Wealth Management**, *Paraplanner*
- **Saltus Partners LLP**, *Paraplanner*
- **Saunderson House Limited**, *Assistant Financial Planner*
- **Saunderson House Limited**, *Associate Financial Planner*
- **Saunderson House Limited**, *Head of Paraplanning*

- **Scrutton Bland**, *Technical Paraplanner*
- **Stonehage Fleming Group**, *Paraplanner*
- **Stonehage Fleming Group**, *Technical Planning Manager*
- **The Fry Group**, *Head of Paraplanning*
- **Timothy James and Partners Ltd**, *Finance Executive*
- **Timothy James and Partners Ltd**, *Finance Executive*
- **Timothy James and Partners Ltd**, *Finance Support Executive*
- **Timothy James and Partners Ltd**, *Paraplanner*
- **Wingate Wealth Management Ltd**, *Paraplanning Team Manager*

FACILITATORS & SPEAKERS

- **Door**, *Head of Business Development, EMEA*
- **Fintel**, *Managing Director*
- **HSBC Global Asset Management (UK) Limited**, *Global Chief Strategist*
- **Owen James Group**, *Managing Director*
- **Savanta**, *Director*
- **Valerie van Mulukom**, *Cognitive scientist*
- **Victoria Humphries**, *Business resilience trainer*
- **Wild Ochre Consulting**, *Founder*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **HSBC Global Asset Management (UK) Limited**, *Associate Director*