

## Sponsors



## Participant List

### BUSINESS STRATEGY

- **1825**, *Business Development Director*
- **AFH Wealth Management**, *Group Head of Advice*
- **Attivo Group**, *Client Service Director*
- **Beaufort Group**, *Group Chairman*
- **Brooks Macdonald Group Plc**, *MD Financial Planning & Group Marketing and Propositions Director*
- **Continuum (FS) LLP**, *Managing Partner*
- **Defaqto Ltd.**, *CEO*
- **Discover Financial Group**, *Director*
- **EQ Investors**, *Executive Director*
- **EQ Investors**, *Senior Director*
- **Helm Godfrey Partners Ltd**, *Chairman of the Board*
- **Helm Godfrey Partners Ltd**, *Managing Director and CEO*
- **Mazars LLP**, *CEO Mazars Financial Planning Ltd*
- **New Leaf Distribution**, *Chief Executive Officer*
- **New Leaf Distribution**, *Managing Director*
- **Pi Financial Ltd**, *CEO*
- **Punter Southall Financial Management Ltd**, *Principal, Financial Planning*
- **Punter Southall Financial Management Ltd**, *Principal*
- **Quilter Financial Planning**, *Chief Executive*
- **RSMR**, *Director*

- **Sandringham Financial Partners**, *CEO*
- **Saunderson House**, *Chief Executive Officer*
- **Schroders Personal Wealth**, *Head of Advice Strategy*
- **Sesame Bankhall Group**, *Chief Executive Officer*
- **Sesame Bankhall Group**, *Managing Director of Bankhall and PMS*
- **SimplyBiz Plc**, *Managing Director*
- **Smith & Williamson**, *Director and Head of Financial Planning*
- **Succession Advisory Services**, *Managing Director*
- **Succession Wealth**, *Chief Client Officer*
- **Tavistock Investments Plc**, *Managing Director*
- **Tenet Group**, *Chief Executive*
- **The Private Office**, *CEO*
- **Threesixty services LLP**, *Managing Director*
- **Tilney Group**, *Financial Planning - Director*
- **Tilney Group**, *Financial Planning Director*
- **Tilney Group**, *Managing Director*
- **VouchedFor**, *Managing Director*
- **Wealth Holdings**, *Chief Executive Officer*
- **Willis Owen**, *Managing Director*

## INVESTMENT

- **AFH Wealth Management**, *Group Head of Investment Research*
- **Aviva**, *Head of Advice*
- **Charles Stanley Plc**, *Group Head of Distribution*
- **Coutts & Co - Natwest Umbrella**, *Head of Financial Planning & Client Needs and Advice Journey*  
*Owner*
- **Fairstone Financial Management Ltd**, *Head of Investment Management*
- **Hargreaves Lansdown Group**, *Head of Workplace Strategic Development*
- **Helm Godfrey Partners Ltd**, *Wealth Management Director*
- **Mattioli Woods Plc**, *Business Development Director*
- **Mazars LLP**, *Chief Investment Officer*
- **Origen Financial Services**, *Director, Business Development*
- **Personal Touch Financial Services**, *Head of Wealth Management*
- **Pi Financial Ltd**, *Business and Development Director*
- **Punter Southall Aspire**, *Director Workplace Solutions*
- **Sandringham Financial Partners**, *Director of Recruitment*

- **Tenet Group**, *Group Operations Director*
- **The Private Office**, *Chief Financial Officer*
- **The Private Office**, *Senior Partner/Member of Investment Committee*
- **True Potential**, *Distribution Director*
- **Unique Financial Planning**, *Distribution Director*
- **Wealth Wizards**, *Chief Commercial Officer*
- **Wren Sterling**, *Head of Later Life Advice*

## **SPONSORS & EXPERTS**

- **AKG Financial Analytics Ltd**, *Communications Director*
- **Aviva Investors**, *Head of Third Party Sales*
- **Carmignac**, *Business Development Director, Head of Regional Sales*
- **Carmignac**, *Head of UK Distribution*
- **FundsNetwork**, *Head of Strategic Accounts*
- **Goldman Sachs Asset Management International**, *Executive Director*
- **Goldman Sachs Asset Management International**, *Executive Director*
- **Goldman Sachs Asset Management International**, *Managing Director, Business Strategy, Strategic Advisory Solutions*
- **Legg Mason Global Asset Management**, *Head of Retirement*
- **Somers Partnership**, *Founder*

## **FACILITATORS & SPEAKERS**

- **Atlantic House Investments**, *Head of Distribution*
- **Esperto Business Solutions**, *Founder*
- **Orion Consultancy Limited**, *Consultant*
- **Rennison Consulting Ltd**, *Director*
- **Richard Parkin Consulting**, *Managing Director*
- **Soprano Consulting**, *Managing Director*
- **Wild Ochre Consulting**, *Founder*