

Sponsors



Participant List

BUSINESS STRATEGY

- **Amber River**, *Chief Executive Officer*
- **Ascot Lloyd**, *Acquisitions Director*
- **Aviva**, *Head of Adviser Platform*
- **Beaufort Group (acquired by Solomon Holdings)**, *Joint Chairman*
- **Blevins Franks Financial Management Limited**, *Head of Wealth Structuring*
- **Brown Shipley & Co Limited**, *Head of Wealth Planning*
- **Charles Stanley Plc**, *Director Foundation Planning*
- **Charles Stanley Plc**, *Head of Asset Management*
- **Charles Stanley Plc**, *Managing Director - Charles Stanley Central Financial Services*
- **Clifton Asset Management PLC**, *Director*
- **Colmore Partners**, *Managing Director*
- **Connor Broadley Ltd**, *CEO & Co-Founder*
- **Connor Broadley Ltd**, *Co-Founder & Managing Director*
- **Continuum (Financial Services) LLP**, *Head of Partnership Development*
- **Defaqto Ltd.**, *Chief Executive Officer*
- **EQ Investors Limited**, *Joint CEO & Head of Financial Planning*
- **Fairstone Financial Management Ltd**, *National Projects Director*

- **Fintel**, *Chairman*
- **Fintel**, *Group Joint CEO*
- **Fintel**, *Managing Director*
- **Foster Denovo**, *Chief Executive Officer*
- **Grant Thornton**, *Head of Financial Services*
- **Helm Godfrey Partners Ltd**, *Chairman of the Board*
- **Independent**, *Principal Insight Consultant (Funds & DFM)*
- **Kingswood**, *UK Chief Executive Officer*
- **Liberate Wealth**, *Chief Executive Officer*
- **M&G Wealth Advice**, *Managing Director - M&G Wealth Advice Partnership*
- **MI Capital Research Limited**, *Director*
- **MKC Wealth Ltd**, *Compliance Director*
- **MWA Financial**, *Chief Executive Officer*
- **MWA Financial**, *Executive Chairman*
- **Mattioli Woods Plc**, *Business Development Director*
- **Mazars Financial Planning Limited**, *Head of Financial Planning Ltd*
- **New Leaf Distribution**, *Managing Director*
- **New Leaf Distribution**, *Principal & Founder*
- **One Four Nine Group**, *Chief Executive Officer*
- **Openwork Limited**, *Commercial Development Director*
- **Origen Financial Services**, *Head of Private Client*
- **Paradigm Norton Financial Planning Ltd**, *Chief Executive Officer*
- **Pi Financial Ltd**, *Business and Development Director*
- **Pi Financial Ltd**, *Chief Executive Officer*
- **Quilter Financial Planning**, *Director of Advice & Distribution Delivery*
- **RSMR**, *Co Founder & NED*
- **St. James's Place Wealth Management Plc**, *Director – Channel Marketing Field Management Team*
- **Tavistock Private Client Limited**, *Group Corporate Development Director*
- **Tenet Group**, *CEO*
- **Tenet Group**, *Managing Director - Tenet Network Services*
- **The Private Office**, *Chief Executive Officer*
- **Threesixty services LLP**, *Chief Executive Officer*
- **Tribe Impact Capital LLP**, *Partner*
- **True Wealth Group**, *Chief Executive Officer*
- **Willis Owen Limited**, *Managing Director*

INVESTMENT

- **AFH Wealth Management**, *Chief Advice Officer*
- **Argentis Financial Planning Ltd**, *Head of Client and Proposition*
- **Ascot Lloyd**, *Investment Director*
- **Atomos (previously Sanlam Wealth)**, *Head of Wealth Planning*
- **Aviva**, *Head of Client Proposition (SFM and SEBS)*
- **Barclays Wealth & Investment Management UK**, *Managing Director & Global Head of Distribution for Banking and Credit Barclays Private Bank*
- **Evelyn Partners**, *Head of IFA Integration*
- **Fundsmith**, *Head of Research*
- **Independent**, *Managing Director - Financial Planning*
- **Independent**, *Project Director*
- **JPMorgan Chase & Co**, *Managing Director*
- **Magus Private Wealth Limited**, *Chief Executive Officer and Chief Investment Officer*
- **Mazars Financial Planning Limited**, *Chief Investment Officer*
- **New Leaf Distribution**, *Investment Director*
- **Openwork Limited**, *Wealth Proposition Director*
- **Origen Financial Services**, *Director, Proposition and Marketing*
- **The Fry Group**, *UK Financial Planning Manager*
- **Validpath Ltd**, *Succession Director*
- **Wren Sterling Financial Planning Limited**, *Head of Later Life Advice*

SPONSORS & EXPERTS

- **Canada Life Limited**, *Head of Business Development*
- **Canada Life Limited**, *Head of Commercial*
- **Charles Stanley Plc**, *Group Head of Sales*
- **Charles Stanley Plc**, *Head of Strategic Partnerships*
- **Dorsum Ltd**, *Head of Product - Wealth Portal*
- **Dorsum Ltd**, *International Sales Director*
- **Fidelity International**, *Associate Director, FundsNetwork Strategic Accounts*
- **Fidelity International**, *Associate Director, Strategic Accounts*
- **GSAM**, *Executive Director, UK & Ireland Retail Client Business*
- **GSAM**, *Head of Business Strategy, GSAM Strategic Advisory Solutions*
- **GSAM**, *Managing Director, Head of UK & Ireland Retail Distribution*
- **GSAM**, *Senior Strategist, GSAM Strategic Advisory Solutions*
- **HSBC Asset Management (UK) Limited**, *Chief Global Strategist*
- **HSBC Asset Management (UK) Limited**, *Head of UK Intermediary Business Development*
- **Mercer Global Investments**, *Director of Wealth Management, UK*

- **Ruffer LLP**, *Business Development Director*
- **Ruffer LLP**, *Investment Director*

FACILITATORS & SPEAKERS

- **Catalyst Partners**, *Director*
- **Catalyst Partners**, *Director*
- **Catalyst Partners**, *Divisional Director of Mergers & Acquisitions*
- **Change Squared Ltd**, *Director of Progress*
- **FoxRed Insight**, *Director*
- **Keynote Speaker**
- **Mint Blue Consulting Ltd**, *Owner and Director*
- **Silverback Consultancy**, *Founder*
- **Wild Ochre Consulting**, *Founder*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Financial Conduct Authority**, *Head of Department*
- **Financial Conduct Authority**, *Head of Retail Investments Department*
- **Financial Vulnerability Taskforce**, *Chief Executive Officer*