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Participant List

BUSINESS STRATEGY

- **Ascot Lloyd**, *Acquisitions Director*

- **Attivo Group**, *Head of Financial Planning*

- **Attivo Group**, *Regional Director*

- **Aviva**, *Head of Adviser Platform*

- **Aviva**, *Managing Director for Wealth & Advice*

- **Beaufort Group (acquired by Solomon Holdings)**, *Vice Chair*

- **Beckett Investment Management**, *Chairman*

- **Blevins Franks Financial Management Limited**, *Head of Wealth Structuring*

- **Charles Stanley Plc**, *Head of Asset Management*

- **Charles Stanley Plc**, *Managing Director - Charles Stanley Central Financial Services*

- **Charles Stanley Plc**, *Managing Director, Financial Planning*

- **Clifton Asset Management PLC**, *Director*

- **Colmore Partners**, *Financial Planning Director*

- **Continuum (Financial Services) LLP**, *Head of Partnership Development*

- **Continuum (Financial Services) LLP**, *IFA and Partner*

- **Defaqto Ltd.**, *Chief Executive Officer*

- **Fairstone Financial Management Ltd**, *National Projects Director*

- **Fintel**, *Group Joint CEO*
- **Fintel**, *Managing Director*
- **Foster Denovo**, *Chief Executive Officer*
- **Grant Thornton**, *Head of Financial Services M&A*
- **Independent**, *Consultant*
- **Independent**, *Managing Director*
- **Kingswood**, *Group Chief Executive Officer*
- **Liberate Wealth**, *Chief Executive Officer*
- **M&G Wealth**, *Managing Director - M&G Wealth Advice Partnership*
- **Openwork Limited**, *Commercial Development Director*
- **Parmenion Capital Partners LLP**, *Chief Commercial Officer*
- **Pi Financial Ltd**, *Business and Development Director*
- **Pi Financial Ltd**, *Chief Executive Officer*
- **Platforum**, *Head of Editorial Strategy*
- **Quilter plc**, *Mergers and Acquisitions Director*
- **RSMR**, *Director*
- **St. James's Place Wealth Management Group**, *Recruitment Director*
- **Tavistock Investments Plc**, *Group Corporate Development Director*
- **Tenet Group**, *Managing Director - Tenet Network Services*
- **The Private Office**, *Chief Marketing Officer*
- **Timothy James and Partners Ltd**, *Director*
- **Tribe Impact Capital LLP**, *Co-Founder*
- **Tribe Impact Capital LLP**, *Partner*
- **Wealth Wizards**, *Head of Personal Advice*
- **Willis Owen Limited**, *Managing Director*

INVESTMENT

- **Argentis Financial Planning Ltd**, *Head of Client and Proposition*
- **Atomos**, *Head of Financial Planning*
- **Atomos**, *Proposition Director*
- **Blevins Franks Financial Management Limited**, *Head of Proposition*
- **Canaccord Genuity Wealth Planning Ltd**, *Head Of Distribution*
- **Finli Group (formerly Solomon Capital Holdings)**, *Regional Director - Scotland*
- **Hargreaves Lansdown Asset Management Limited**, *Head of Advisory Proposition*
- **Independent**, *Project Director*
- **Kingswood**, *Managing Director - Head of Wealth Planning*
- **Magus Private Wealth Limited**, *Chief Executive Officer and Chief Investment Officer*

- **Mazars Financial Planning Limited**, *Chief Investment Officer*

- **Openwork Limited**, *Proposition Director*

- **Openwork Limited**, *Wealth Proposition Director*

- **Origen Financial Services**, *Director, Proposition and Marketing*

- **Paradigm Norton Financial Planning Ltd**, *Investment Committee Chair*

- **Progeny Wealth Limited**, *Chief of Advisory Services*

- **St. James's Place Wealth Management Group**, *Commercial Director*

- **The Fry Group**, *UK Financial Planning Manager*

- **The Private Office**, *Snr Partner*

- **Trinity Lifetime Partners**, *Wealth Proposition Director*

- **Validpath Ltd**, *Succession Director*

- **Wren Sterling Financial Planning Limited**, *Head of Later Life Advice*

FACILITATORS & SPEAKERS

- **Keynote Speaker**, *Experienced educator, executive coach and leadership team coach*

- **Catalyst Partners**, *Director*

- **Catalyst Partners**, *Divisional Director of Mergers & Acquisitions*

- **Change Squared Ltd**, *Director of Progress*

- **FiComm Partners**, *CEO and Co-Founder*

- **Independent Consultant**, *Director*

- **JoyndUp Ltd**, *Director*

- **Keynote Speaker**, *Director of the Institute for Government*

- **Owen James Events**, *Managing Director*

- **Solve**, *Director Consultant*

- **Tata Consultancy Services (TCS)**, *Head of UK CXT*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Independent Consultant**, *Managing Partner*