

A Meeting of Minds - Advisory Distributor June 2024
Thursday 27 June 2024, Tylny Hall Hotel and Gardens, Ridge Lane, Hook, RG27 9AZ

Sponsors



Participant List

BUSINESS STRATEGY

- **AKG Financial Analytics**, *Director*
- **Advanta Wealth**, *Chief Commercial Officer*
- **Aviva**, *Head of Adviser Platform*
- **Beckett Investment Management**, *Chairman*
- **Blevins Franks Financial Management Limited**, *Head of Wealth Structuring*
- **Charles Stanley**, *Head of Asset Management*
- **Charles Stanley**, *Managing Director - Charles Stanley Central Financial Services & Chief Client Officer*
- **Clifton Asset Management**, *Director*
- **Colmore Partners**, *Financial Planning Director*
- **Colmore Partners**, *Managing Director*
- **Continuum**, *IFA and Partner*
- **Continuum**, *Managing Partner*
- **Defaqto**, *Chief Executive Officer*
- **Finli Group**, *Chief Distribution Officer*
- **Foster Denovo**, *Chief Executive Officer*
- **Grant Thornton**, *Head of Financial Services M&A*

- **Liberate Wealth**, *Chief Executive Officer*
- **M&G Wealth**, *Managing Director - M&G Wealth Advice Partnership*
- **One Four Nine Group**, *Chief Executive Officer*
- **Openwork**, *Commercial Director*
- **Origen Financial Services**, *Head of Private Client*
- **Parmenion Capital Partners**, *Chief Commercial Officer*
- **Pi Financial**, *Business and Development Director*
- **Pi Financial**, *Chief Executive Officer*
- **Quilter**, *Mergers and Acquisitions Director*
- **RSMR**, *Director*
- **St. James's Place Wealth Management Group**, *Director Partnership Recruitment*
- **Tavistock Investments**, *Corporate Development Director*
- **Threesixty services**, *Chief Executive Officer*
- **Timothy James and Partners**, *Director*
- **Tribe Impact Capital**, *Managing Partner*
- **Wealth Wizards**, *Senior Financial Planning Consultant*
- **Willis Owen Limited**, *Managing Director*

INVESTMENT

- **AFH Wealth Management**, *Chief Advice Officer*
- **Argentis Financial Planning Ltd**, *Chief Client Officer*
- **Atomos**, *Head of Financial Planning*
- **Atomos**, *Proposition Director*
- **Barclays Wealth & Investment Management UK**, *Managing Director & Global Head of Distribution for Banking and Credit Barclays Private Bank*
- **Blevins Franks Financial Management Limited**, *Head of Proposition*
- **Canaccord Genuity Wealth Planning**, *Group Head Of Distribution*
- **Evelyn Partners**, *Head of IFA Integration*
- **Kingswood**, *Managing Director - Head of Wealth Planning*
- **Magus Private Wealth Limited**, *Chief Executive Officer and Chief Investment Officer*
- **Mazars Financial Planning Limited**, *Partner*
- **Openwork Limited**, *Proposition Director*
- **Origen Financial Services**, *Head of Research and Investment*
- **Paradigm Norton Financial Planning**, *Investment Committee Chair*
- **Progeny Wealth Limited**, *Chief of Advisory Services*
- **Quilter**, *Head of Acquisitions*
- **St. James's Place Wealth Management Group**, *Commercial Director*

- **The Fry Group**, *Regional Advisory Service Manager*
- **The Private Office**, *Senior Partner*
- **Trinity Lifetime Partners**, *Wealth Proposition Director*
- **Validpath**, *Succession Director*
- **Wren Sterling Financial Planning Limited**, *Head of Later Life Advice*

SPONSORS & EXPERTS

- **Aviva Investors**, *CIO Multi-Asset & Macro*
- **Aviva Investors**, *Head of UK Wealth*
- **Aviva Investors**, *Strategic Relationship Director*
- **Dorsum** *International Sales Director*
- **Dynamic Planner**, *Enterprise Development Director*
- **Dynamic Planner**, *Head of Large Business Development*
- **Franklin Templeton Investments**, *Vice President EMEA/APAC Head of Industry Advisory Services*
- **GSAM**, *Executive Director, UK & Ireland Retail Client Business*
- **GSAM**, *Head of Business Strategy, GSAM Strategic Advisory Solutions*
- **GSAM**, *Head of Strategic Partners, UK & Ireland Retail Client Business*
- **Nucleus**, *Director of Key Accounts and Strategic Partners*
- **Nucleus**, *Strategic Account Director*
- **Puma Investments**, *Head of Strategic Partnerships*
- **Puma Investments**, *Investment Manager*
- **Puma Investments**, *Strategic Partnerships Executive*
- **SEI**, *Business Development Director*
- **SEI**, *Head of UK/EMEA Marketing*
- **Schroders**, *Sales Director, Private Assets and Investment Trusts*
- **Timeline**, *Chief Commercial Officer*
- **Timeline**, *Head of Strategic Partners*
- **Vanguard**, *Senior Specialist, Financial Advisor Services*
- **Vanguard**, *Strategic Account Manager - DFM*
- **Vanguard**, *Strategic Account Manager*

FACILITATORS & SPEAKERS

- **Catalyst Partners**, *Director*
- **Catalyst Partners**, *Divisional Director of Mergers & Acquisitions*
- **FiComm Partners**, *CEO and Co-Founder*

- **JoyndUp Ltd**, *Director*
- **Keynote Speaker**, *Director of the Institute for Government*
- **Keynote Speaker**, *Experienced educator, executive coach and leadership team coach*
- **Melo**, *Chief Innovation Officer & Director of Progress*
- **Mint Blue Consulting Ltd**, *Owner and Director*
- **Owen James Events**, *Managing Director*
- **Silverback Consultancy**, *Founder & Director*
- **Tata Consultancy Services (TCS)**, *Head of UK FS Customer Transformation*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Conduct Culture Ltd**, *Director*
- **Fintel IQ**, *Advisor. Fintech and Financial Services*
- **Fintel**, *Managing Director*
- **Independent Consultant**, *NED- Various*
- **Independent**, *Former CEO Tenet*
- **Independent**, *Non-executive Director*
- **Independent**, *Project Director*
- **Platforum**, *Head of Editorial Strategy*
- **Solve**, *Director*
- **VouchedFor**, *Managing Director*