

A Meeting of Minds - Gatekeepers March 2024
Thursday 14 March 2024, The Berkeley Hotel, Wilton Place, Knightsbridge, London, SW1X 7RL

Sponsors



Participant List

- **AFH Wealth Management**, *Head of Investment Research*
- **Alder Investment Management Ltd**, *Chief Investment Officer*
- **Atomos**, *Head of High Net Worth*
- **Avellemy Limited**, *Head of Collectives*
- **Bordier & Cie (UK) PLC**, *Head of Fund Research*
- **Canaccord Genuity Wealth Planning Ltd**, *Head of equity fund research*
- **Cavendish Ware Limited**, *CIO & Head of Investment*
- **Charles Stanley Plc**, *Head of Asset Management*
- **City Asset Management Plc**, *Chief Investment Officer*
- **Clifton Asset Management PLC**, *Director*
- **Collidr**, *Senior Investment Strategist*
- **Copia Capital Management**, *Head of investments*
- **Defaqto Ltd.**, *Insight Manager (Funds and DFM)*
- **EQ Investors Limited**, *Joint Chief Executive Officer*
- **Fideliuss**, *Investment Analyst*
- **Foster Denovo**, *Head of Investment Research*
- **Hargreaves Lansdown Asset Management Limited**, *Head of Fund Research*
- **Hay Hill Wealth Management**, *Chief Investment Officer*
- **IBOSS Asset Management Limited (acquired by Kingswood)**, *Chief investment officer*
- **IPS Capital LLP**, *Investment Analyst*
- **Independent Wealth Planners (IWP UK)**, *Chief Investment Officer*

- **Investec Wealth & Investment (UK)**, *Head of Equity Collectives*
- **Investec Wealth & Investment (UK)**, *Head of Fixed Income Collectives*
- **J. Stern & Co LLP**, *Investment Specialist and Client Director*
- **LeifBridge Investment Services**, *Investment Manager*
- **M&G Wealth**, *Chief Investment Officer*
- **MI Capital Research Limited**, *Head of Research*
- **Morningstar**, *Global Head of Manager Selection, Due Diligence Services*
- **Oberon Investments Limited**, *Head of Investments*
- **Parmenion Capital Partners LLP**, *Investment Director*
- **Ptarmigan Capital Limited**, *Director & CEO*
- **Quilter Financial Planning**, *Director of Advice & Distribution Delivery*
- **Quilter Financial Planning**, *Managing Director of Quilter Financial Advisers, National Advice Business*
- **RSMR**, *Head of Research*
- **Redington**, *Head of Global Assets*
- **SG Kleinwort Hambros Bank Limited**, *Head of Portfolio Construction*
- **Sesame Bankhall Group**, *Strategic Relationship Manager - Wealth*
- **Shard Capital**, *CIO*
- **Square Mile Investment Services Limited**, *Associate Director - Responsible Investment*
- **The Private Office**, *Chief Investment Officer*
- **The Private Office**, *Head of Investments*
- **Tribe Impact Capital LLP**, *Business Development Manager*
- **Tribe Impact Capital LLP**, *Partner*

SPONSORS & EXPERTS

- **Aegon Asset Management**, *Business Development Manager – London & Channel Islands*
- **Aegon Asset Management**, *Head of Europe High Yield*
- **Capital Group**, *Co-Head Business Data, Analytics & Tools*
- **Capital Group**, *Managing Director, UK Financial Intermediaries*
- **Invesco**, *Client Director*
- **Invesco**, *Head of Discretionary & Strategic Partnerships*
- **Invesco**, *Head of UK Government Relations and Public Policy*
- **Lazard Asset Management**, *Managing Director, Head of Third Party Distribution*
- **Lazard Asset Management**, *Managing Director, Portfolio Manager/Analyst*
- **Principal Asset Management**, *Associate Director, UK Fund Distribution*
- **Principal Asset Management**, *Managing Director, Chief Strategist*
- **Principal Asset Management**, *Vice President, International Government Relations*

- **RBC BlueBay Asset Management**, *Senior Portfolio Manager*
- **RBC BlueBay Asset Management**
- **Schroders Plc**, *Head of London and Wealth*
- **Schroders Plc**, *Regional Sales Manager and Third Party Distribution*

FACILITATORS & SPEAKERS

- **Asset Risk Consultants (UK) Limited**, *Managing Director*
- **Davies Group (was Sionic)**, *Director*
- **Door**, *Head of Business Development, EMEA*
- **Independent Consultant**, *Strategic Advisor*
- **Independent**, *Consultant*
- **Maanch**, *CEO & Founder*