

Sponsors



Participant List

BUSINESS STRATEGY

- **Affinity Private Wealth**, *Chief Executive Officer*
- **Arbion Limited**, *Chief Executive Officer*
- **Artorius Wealth Ltd**, *CEO*
- **Atomos Investments Limited**, *Chief Executive Officer*
- **BOS Wealth Management Europe - UK Branch**, *Executive Director*
- **Bordier & Cie (UK) PLC**, *Chief Executive Officer*
- **Brewin Dolphin Limited**, *Chief of Staff*
- **Brown Shipley & Co Limited**, *CEO*
- **C Hoare & Co**, *Head of Private Banking*
- **Connor Broadley Ltd**, *CEO & Co-Founder*
- **Connor Broadley Ltd**, *Co-Founder & Director*
- **Credit Suisse (UK) Limited**, *COO - Wealth Management UK Credo*,
• *Chairman*
- **Credo**, *Director and Head: Private Clients*
- **Deutsche Bank Wealth Management**, *Deputy Chief Operating Officer*
- **Fintel**, *Managing Director*

- **Hampden & Co**, *Chief Commercial Officer*
- **Hampden & Co**, *Head of Private Banking, London*
- **Hanover Investors**, *Senior Partner - Head of Investor Relations and Fundraising*
- **Hawksmoor Investment Management Limited**, *Chief Executive Officer*
- **JM Finn & Co Ltd**, *Chief Operating Officer, Investment Management*
- **Julius Baer International Ltd**, *Chief Executive Officer*
- **Julius Baer International Ltd**, *Head of Client Strategy and Experience for Switzerland and Europe*
- **Lombard Odier Investment Managers**, *UK Head*
- **London and Capital Wealth Advisers Limited**, *Partner & Chief Executive Officer*
- **Oakham Wealth Management**, *Chief Executive*
- **Quartet Capital Partners LLP**, *Managing Partner*
- **Quilter Financial Planning**, *National Sales Director*
- **Quilter plc**, *Executive Director - Head of Strategic Change*
- **SEB**, *Head of SEB 1856 UK*
- **SG Kleinwort Hambros Bank Limited**, *Head of Client Solutions Group*
- **Sarasin & Partners LLP**, *Chief Operating Officer, Client Affairs*
- **Sarasin & Partners LLP**, *Managing Partner*
- **Seven Investment Management**, *Head of Private Clients*
- **St. James's Place Wealth Management Group**, *Director of Partner Engagement and Consultancy*
- **St. James's Place Wealth Management Group**, *Divisional Director for Banking and Private Client Strategy*
- **Stonewood Wealth Management**, *Director*
- **Thomson Tyndall**, *Investment Director*
- **Tribe Impact Capital LLP**, *Co-Founder*
- **UBP - Union Bancaire Privee**, *Chief Operating Officer*
- **WH Ireland**, *Chief Operating Officer (Wealth)*
- **Waverton Investment Management Limited**, *Chief Executive Officer*
- **Weatherbys Private Banking Ltd**, *MD & Head of Private Banking*
- **Wimmer Finance Ltd**, *Chief Executive Officer*

INVESTMENT

- **BNP Paribas Wealth Management UK**, *Global Chief Investment Officer*
- **Beauclerc Advisory Services Ltd**, *Managing Partner*
- **Brewin Dolphin Limited**, *Investment Director*
- **Cavendish Ware Limited**, *CIO & Head of Investment*
- **Cerno Capital Partners LLP**, *Managing Partner*
- **Evelyn Partners**, *Partner*

- **Hay Hill Wealth Management**, *Chief Investment Officer*
- **J. Stern & Co LLP**, *Investment Specialist and Client Director*
- **Lloyds Bank Private Banking Ltd**, *Director, Key Clients, Lloyds Private Banking*
- **London and Capital Wealth Advisers Limited**, *Partner & Head of the Private Investment Office*
- **M&G Wealth**, *Chief Investment Officer*
- **MASECO Private Wealth**, *Partner - Senior Wealth Manager*
- **Quilter Financial Planning**, *Managing Director of Quilter Financial Advisers, National Advice Business*
- **Rathbones Group Plc**, *Investment Director*
- **SG Kleinwort Hambros Bank Limited**, *Group Chief Operating Officer*
- **SG Kleinwort Hambros Bank Limited**, *Head of Private Banking, Commercial Director*
- **Tyndall Investment Management**, *Director*

FACILITATORS & SPEAKERS

- **Keynote Speaker**, *Experienced educator, executive coach and leadership team coach*
- **Alpha FMC**, *Wealth Management & Client Insight industry expert*
- **Asset Risk Consultants (UK) Limited**, *Managing Director*
- **Financial Conduct Authority**, *Head of Department (Advisers, Wealth and Pensions)*
- **Independent Consultant**, *Strategic Advisor*
- **Independent**, *Project Director*
- **Opus Una**, *Founder - Wealth Management Transformation & FinTech Acceleration Owen*
- **James Events**, *Managing Director*
- **Savanta**, *Director Wealth*
- **Solve**, *Director Consultant*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Independent Consultant**, *Strategic Adviser*
- **Philanthropy Impact**, *Director of Membership and Development*
- **Promising Outcomes**, *Co-Founder and Chairman*