

Sponsors



Participant List

BUSINESS STRATEGY

- AIB Private Banking, *Head of Lending, Strategy & Operations*
- Affinity Private Wealth, *Chief Executive Officer*
- Artorius Wealth Ltd, *CEO*
- Atomos Investments Limited, *Group Chief Executive Officer*
- BOS Wealth Management Europe - UK Branch, *Executive Director*
- BOS Wealth Management Europe - UK Branch, *Managing Director*
- Bordier & Cie (UK) PLC, *Chief Executive Officer*
- Brown Shipley & Co Limited, *CEO*
- Carlton Square Capital, *Chief Executive Officer*
- Charles Stanley & Co Ltd, *Chief Executive Officer*
- Credit Suisse (UK) Limited, *COO - Wealth Management UK*
- Credo, *Chairman*
- Credo, *Chief Executive Officer*
- Credo, *Director and Head: Private Clients*

- **Deutsche Bank Wealth Management**, *Deputy Chief Operating Officer*
- **EFG Harris Allday**, *Deputy Chief Executive Officer*
- **Evelyn Partners**, *Head of FS Sales Strategy and Analytics*
- **Fintel**, *Managing Director*
- **Hampden & Co**, *Head of Private Banking, London*
- **Handelsbanken Asset Management**, *CEO, Wealth and Asset Management*
- **Hassium Asset Management LLP**, *Managing Director and Chief Operating Officer*
- **Hawksmoor Investment Management Limited**, *Chief Executive Officer*
- **Independent Consultant**
- **Investec Wealth & Investment (UK)**, *CEO*
- **Investec Wealth & Investment (UK)**, *Director & Head of Fixed Interest*
- **JM Finn & Co Ltd**, *Chief Operating Officer, Investment Management*
- **Julius Baer International Ltd**, *Chief Executive Officer*
- **London and Capital Wealth Advisers Limited**, *Partner & Chief Executive Officer*
- **Murray Asset Management (acquired by Investec Wealth & Investment)**, *Divisional Director - Investec Wealth and Investment*
- **Oakham Wealth Management**, *Chief Executive*
- **PASHA Private Banking**, *Executive Director*
- **Quartet Capital Partners LLP**, *Managing Partner*
- **Quilter Financial Planning**, *National Sales Director*
- **SEB**, *Head of SEB 1856 UK*
- **SG Kleinwort Hambros Bank Limited**, *Head of Client Solutions Group*
- **Santander Wealth Management**, *UK Head of Wealth Management & Insurance*
- **Sarasin & Partners LLP**, *Chief Operating Officer, Client Affairs*
- **Sarasin & Partners LLP**, *Partner, Private Clients*
- **St. James's Place Wealth Management Group**, *Director of Partner Engagement and Consultancy*
- **Thomson Tyndall**, *Investment Director*
- **Tribe Impact Capital LLP**, *Co-Founder*
- **Tribe Impact Capital LLP**, *Partner*
- **UBP - Union Bancaire Privee**, *Managing Director*
- **WH Ireland**, *Chief Operating Officer (Wealth)*
- **Waverton Investment Management Limited**, *Chief Executive Officer*
- **Wimmer Finance Ltd**, *Chief Executive Officer*

INVESTMENT

- **AIB Private Banking**, *Head of Private Banking*
- **BNP Paribas Wealth Management UK**, *Global Chief Investment Officer*

- **BRI Wealth Management PLC**, *Chief Executive Officer*
- **Barclays Wealth & Investment Management UK**, *Managing Director & Global Head of Distribution for Banking and Credit Barclays Private Bank*
- **Beauchlerc Advisory Services Ltd**, *Managing Partner*
- **Brooks Macdonald Group Plc**, *Head of Private Clients*
- **Cavendish Ware Limited**, *CIO & Head of Investment*
- **Credo**, *Chief Investment Officer*
- **EQ Investors Limited**, *Joint Chief Executive Officer*
- **Evelyn Partners**, *Partner*
- **Hay Hill Wealth Management**, *Chief Investment Officer*
- **J. Stern & Co LLP**, *Investment Specialist and Client Director*
- **Lincoln Private Investment Office**, *Chief Investment Officer*
- **Lloyds Bank Private Banking Ltd**, *Director, Key Clients, Lloyds Private Banking*
- **London and Capital Wealth Advisers Limited**, *Partner & Head of the Private Investment Office*
- **MASECO Private Wealth**, *Partner - Senior Wealth Manager*
- **Morningstar**, *Global Head of Manager Selection, Due Diligence Services*
- **Pictet Asset Management Limited**, *Head of Investments and CIO*
- **SG Kleinwort Hambros Bank Limited**, *Group Chief Operating Officer*
- **Tyndall Investment Management**, *Director*

FACILITATORS & SPEAKERS

- **Alpha FMC**, *Wealth Management & Client Insight industry expert*
- **Bovill**, *Principal Consultant*
- **Catalyst Partners**, *Director*
- **Financial Conduct Authority**, *Head of Department (Advisers, Wealth and Pensions)*
- **FoxRed Insight**, *Director*
- **Independent**, *Project Director*
- **Sionic**, *Partner - Asset & Wealth Management*
- **The C & D Partnership**, *Managing Partner*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Financial Conduct Authority**, *Lead Associate - Wealth Management Supervision*
- **Financial Conduct Authority**, *Manager (Consumer Investments)*
- **Financial Conduct Authority**, *Manager, Consumer Investments*
- **Financial Conduct Authority**, *Manager, Wealth Management Supervision - Consumer Investments*
- **Multrees**, *Chief People Officer at Multrees Investor Services*