

## Sponsors



## Participant List

### BUSINESS STRATEGY

- **7IM Investment and Retirement Solutions**, *Managing Director, Corporate & Strategy Development*
- **AIB Private Banking**, *Head of Lending & Operations*
- **Affinity Private Wealth**, *Chief Executive Officer*
- **Artorius Wealth**, *CEO*
- **Atomos Investments**, *Chief Executive Officer*
- **Brewin Dolphin**, *Chief of Staff - Wealth Management Europe*
- **Connor Broadley**, *CEO & Co-Founder*
- **Connor Broadley**, *Co-Founder & Director*
- **Credit Suisse (UK)**, *COO - Wealth Management UK*
- **Credo**, *Chief Executive Officer*
- **Credo**, *Director and Head: Private Clients*
- **Deutsche Bank UK Bank**, *Director of Family Offices*
- **Deutsche Bank Wealth Management**, *Head of UK Wealth Management*
- **Deutsche Bank Wealth Management**, *Managing Director*
- **EFG Private Bank**, *Head of Private Banking*
- **Hampden & Co**, *Chief Commercial Officer*
- **Hampden & Co**, *Head of Private Banking, London*

- **Handelsbanken**, *Head of Wealth Management*
- **Hassium Asset Management**, *Managing Director and Chief Operating Officer*
- **Hawksmoor Investment Management**, *Chief Executive Officer*
- **Investec Wealth & Investment (UK)**, *Senior Investment Director*
- **Irwin Mitchell**, *CEO, IM Asset Management*
- **J. Stern & Co**, *Client Director*
- **JM Finn & Co**, *Business Manager*
- **Julius Baer International**, *Chief Executive Officer*
- **Mirabaud Investment Management**, *Director, Senior Private Banker*
- **Mirador Solutions Consultancy**, *CEO*
- **Oakham Wealth Management**, *Chief Executive*
- **Oberon Investments**, *Compliance Officer*
- **Ptarmigan Capital**, *Director & CEO*
- **Quartet Capital Partners**, *Managing Partner*
- **Quilter Cheviot Financial Planning**, *Head of Commercial Development*
- **Quilter Financial Planning**, *National Sales Director*
- **RBC (Royal Bank of Canada) Wealth Management International**, *Head of Banking & Custody, RBC Wealth Management Europe*
- **Rothschild & Co**, *Non Executive Director*
- **SEB**, *Head of SEB 1856 UK*
- **SG Kleinwort Hambros Bank**, *Head of Client Solutions Group*
- **Sarasin & Partners**, *Client Affairs Business Manager, Associate Partner*
- **Sarasin & Partners**, *Partner, Chief Client Officer*
- **St. James's Place Wealth Management Group**, *Divisional Director, Private Client Strategy & Banking*
- **Thomson Tyndall**, *Investment Director*
- **Tribe Impact Capital**, *Managing Partner*
- **Waverton Investment Management**, *Chief Executive Officer*
- **Wimmer Finance**, *Chief Executive Officer*

## INVESTMENT

- **Barclays Wealth & Investment Management UK**, *Managing Director & Global Head of Distribution for Banking and Credit Barclays Private Bank*
- **Beauclerc Advisory Services**, *Executive Partner*
- **Brewin Dolphin**, *Investment Director*
- **Cavendish Ware**, *CIO & Head of Investment*

- **Cerno Capital Partners**, *Managing Partner*
- **Credo**, *Chief Investment Officer*
- **Evelyn Partners**, *Partner*
- **Hay Hill Wealth Management**, *Chief Investment Officer*
- **J. Stern & Co**, *Investment Specialist and Client Director*
- **Lincoln Private Investment Office**, *Chief Investment Officer*
- **Lloyds Bank Private Banking**, *Director, Key Clients, Lloyds Private Banking*
- **Luminous Asset Management**, *Director of Investments, Europe*
- **MASECO Private Wealth**, *Partner - Senior Wealth Manager*
- **Nedbank Private Wealth**, *Executive Head of Wealth Management*
- **Nedbank Private Wealth**, *Senior Credit Specialist*
- **RBC (Royal Bank of Canada) Wealth Management International**, *Chief Investment Officer - British Isles & Asia*
- **SG Kleinwort Hambros Bank**, *Group Commercial Director*
- **Tyndall Investment Management**, *Director, Private Clients*

## **FACILITATORS & SPEAKERS**

- **Alpha FMC**, *Partner*
- **Financial Conduct Authority**, *Head of Department (Advisers, Wealth and Pensions)*
- **Financial Times**, *Artificial Intelligence Editor*
- **Independent Consultant**, *Strategic Advisor*
- **Independent**, *Project Director*
- **Keynote Speaker**, *Deputy Editor*
- **Opus Una**, *Managing Director*
- **Savanta**, *Senior Director, Wealth*
- **Solve**, *Director*

## **INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS**

- **Defaqto**, *Insight & Consulting Director*
- **Financial Conduct Authority**, *Manager (Consumer Investments)*
- **Financial Conduct Authority**, *Manager, Wealth Management Supervision - Consumer Investments*
- **Financial Conduct Authority**, *Senior Associate - Wealth Management*
- **Financial Conduct Authority**, *Senior Associate*
- **Fintel**, *Head of Investment Management Compliance SimplyBiz DFM*
- **Independent Consultant**, *Strategic Adviser*
- **The London Banking Foundation**, *Chief Executive*
- **VouchedFor**, *Chair & Founder*
- **Wealthwise**, *Consultant*