

Sponsors



Participant List

ADVISORY DISTRIBUTORS

- **2plan Wealth Management**, *Head of Proposition*
- **4TheRecord**, *Managing Director and CFP*
- **Alexander House Financial Services Ltd.**, *Managing Director*
- **Argentis Financial Management - acquired by A J Gallagher**, *Executive Chairman*
- **Aviva**, *Head of Advice*
- **BdhSterling**, *Paraplanning Manager*
- **Brewin Dolphin Ltd**, *Specialist – Financial Planning Operations*
- **City Asset Management Plc**, *Head of Financial Planning*
- **Close Brothers Asset Management**, *Director – Advice Special Projects*
- **Connor Broadley Ltd**, *COO*
- **Crowe Clark Whitehill Financial Services Limited**, *Managing Director*
- **DGS Independent Financial Advisers Ltd**, *Partner*
- **Dentons Wealth**, *Director*
- **Fairstone Financial Management Ltd**, *Chief Operating Officer*
- **Financial Planning Partners**, *Managing Director*
- **Foster Denovo**, *Compliance Technical Specialist*
- **Hanbury Wealth LLP**, *Paraplanner Manager*
- **Hargreaves Lansdown Group**, *Interim Head of Workplace Retirement*
- **Hargreaves Lansdown Group**, *Pensions & Retirement Proposition Manager*
- **Heartwood Wealth Management**, *Client Director*
- **Heartwood Wealth Management**, *Head of Investment Product*
- **Helm Godfrey Partners Ltd**, *Director and Wealth Management Adviser*

- **Independent**, *Recruitment Ambassador*
- **Intrinsic Financial Services**, *Group Managing Director*
- **Intrinsic Financial Services**, *Regional Director*
- **Investment Quorum Ltd**, *Wealth Manager*
- **John Lamb LLP**, *Head of Investments*
- **Magus Private Wealth Ltd**, *Chartered Financial Planner*
- **New Leaf Distribution**, *Chief Executive Officer*
- **New Leaf Distribution**, *Investment Director*
- **New Leaf Distribution**, *Managing Director*
- **Nutmeg Savings and Investments**, *Business Analyst*
- **Nutmeg Savings and Investments**, *Head of Financial Advice*
- **Origen Financial Services**, *Director, Business Development*
- **Personal Touch Financial Services**, *Chief Risk officer*
- **Personal Touch Financial Services**, *Head of Sales*
- **Pi Financial Ltd**, *CEO*
- **Punter Southall Aspire**, *Head of Personal & Business Banking Products*
- **Retirement Line**, *Non-executive Director*
- **Sandringham Financial Partners**, *CEO*
- **Sandringham Financial Partners**, *Chief Operating Officer*
- **Sanlam UK**, *Chief Executive Officer*
- **Sesame Bankhall Group**, *Executive Chairman*
- **SimplyBiz Plc**, *Chairman*
- **SimplyBiz Plc**, *Group Compliance Director*
- **SimplyBiz Plc**, *Group Joint CEO*
- **SimplyBiz Plc**, *Managing Director - Consumer Credit Centre*
- **Smith & Williamson**, *Director and Head of Financial Planning*
- **Society of Later Life Advisers**, *Founder and Joint Chair*
- **St. James's Place Wealth Management Group**, *Head of Establishment, Regulatory*
- **Succession Group Ltd.**, *Managing Director*
- **Tenet Group**, *Chief Executive Officer*
- **Tenet Group**, *Group Operations Director*
- **The Private Office**, *Partner*
- **The Private Office**, *Senior Partner/Chair of Investment Committee*
- **Tilney Group**, *Manager - Technical*
- **Whitechurch Securities Ltd**, *Financial Planning Director*
- **Willis Owen**, *Head of Product & Compliance*
- **Willis Owen**, *Head of Research*

WINNING ADVISERS

- **3difs Ltd**, *Managing Director*
- **Advisa Group**, *Director*
- **Advisa Group**, *Director*
- **Aisa Professional**, *Finance Director*
- **Arrow Financial Services UK Limited**, *Director*
- **Atwoods Ltd**, *Managing Director*
- **Autonomy Wealth Management**, *Director*
- **BBI Financial Planning Ltd**, *Financial Adviser*
- **Blue Sky Financial Planning Ltd**, *Managing Director*
- **Broom Consultants Ltd**, *Director*
- **C&S Financial Consultants Ltd**, *Director & IFA*
- **Certus Financial Planning Ltd**, *Director*
- **Chadney Bulgin**, *Partner*
- **Chadwicks**, *Managing Director*
- **Chantler Kent Investments**, *Director*
- **Churchs Financial Planning**, *Managing Director*
- **Clairville York**, *Chartered Financial Planner & Paraplanning Manager*
- **Clairville York**, *Director*
- **Clairville York**, *Managing Director*
- **Clifton Asset Management PLC**, *Group Financial Planning & Business Development Director*
- **Covenham Financial Services Ltd**, *Director IFA*
- **Create and Prosper Financial Services Ltd**, *Founder And Director*
- **D&G Independent Ltd**, *Director/Owner*
- **Darwin Wealth Management**, *Director*
- **De Carteret Wealth**, *Chartered Wealth Manager*
- **Dynamic Wealth/Fairstone Financial Management**, *Managing Director and Professional Financial Planner*
- **Ebor Financial Planning Ltd**, *Operations Director*
- **Equanimity Independent Financial Planners**, *Managing Director*
- **Executive Advisory Services Limited**, *Chairman*
- **Executive Advisory Services Limited**, *Director*
- **Fiducia Wealth Management Limited**, *Executive Chairman*
- **Flowers McEwan Limited**, *Director*
- **GSI Wealth Management Ltd**, *Client Relationship Manager*

- **Go IFA Ltd**, *Compliance and Managing Director*
- **Grosvenor Wealth Management Ltd**, *Director*
- **HFS Milbourne Financial Services**, *Chartered Financial Planner*
- **HFS Milbourne Financial Services**, *Managing Director*
- **Henwood Court Financial Planning Limited**, *Director*
- **IFPC Limited**, *Chartered Financial Planner*
- **IFunds Asset Management**, *Director*
- **Investment Solutions Wealth Management Ltd**, *Director*
- **Joseph Lamb**, *Chief Executive Officer*
- **Just Investment Strategy**, *Managing Director*
- **Lewis Brownlee Financial Services Ltd**, *Director*
- **Lockhart Capital Management LLP**, *Technical Analyst*
- **London Financial Consultants**, *Managing Partner*
- **Lonsdale Services Ltd**, *Director*
- **Lonsdale Services Ltd**, *Managing Director*
- **Lynas Vokes Investments Ltd**, *Managing Director*
- **Makemsons Independent Financial Advice**, *Co-Director*
- **Makemsons Independent Financial Advice**, *Founder and IFA*
- **Multicorp Rose Limited**, *Founder & Managing Director*
- **Nicholls Stevens Financial Services**, *Managing Director*
- **Oakfield Financial Services Ltd**, *Financial Advisor*
- **Oakfield Financial Services Ltd**, *Managing Director*
- **Octagon Consultancy Ltd**, *Practice Director*
- **Omnium Wealth**, *Managing Director*
- **Osprey Capital**, *Director*
- **P F M Associates Ltd**, *Director*
- **Paul Young IFA**, *Managing Director*
- **Paul Young IFA**, *Partner*
- **PensionHelp**, *Managing Director*
- **Pharon Independent Financial Advisers Ltd**, *Director*
- **Pharon Independent Financial Advisers Ltd**, *Senior Adviser*
- **Prismatic Wealth Limited**, *Managing Director*
- **Regency Investment Services Ltd**, *Director*
- **Regency Investment Services Ltd**, *Financial Adviser*
- **Rouse Ltd**, *Managing Director*
- **Satis Asset Management Ltd**, *Director*
- **Taylormade Financial Planning LLP**, *Managing Partner*

- **The Premier Partnership Limited**, *Director*
- **ThinkAge**, *Managing Director*
- **Thomas Miller Investment Ltd**, *Managing Director*
- **Walpole Financial Ltd**, *Director & Financial Planner*
- **Walpole Financial Ltd**, *Director & Financial Planner*
- **Wealthcare Limited**, *Director*
- **Whittaker Financial Solutions Ltd**, *Managing Director*
- **Wilcocks and Wilcocks**, *Managing Director*
- **Wingate Financial Planning**, *Paraplanning Team Manager*

PRIVATE BANKERS & WEALTH MANAGERS

- **AIB Private Banking**, *Head of Private Banking*
- **Aspinalls**, *Chief Executive Officer*
- **BRI Wealth Management Plc**, *Financial Planning Director*
- **Barclays Private Bank**, *Private Banking Executive*
- **Barclays Wealth & Investment Management UK**, *Head of Distribution - Digital Investing*
- **Barclays Wealth**, *Director, Global Head of Quantitative Research*
- **Barclays Wealth**, *Director, Head of Behavioural Finance*
- **Bordier & Cie**, *Head of Wealth Planning*
- **Chetwood Wealth Management**, *Head of Private Clients*
- **Close Brothers Asset Management**, *Head of Adviser Services*
- **Close Brothers Asset Management**, *Product Marketing Manager*
- **Connor Broadley Ltd**, *CEO & Co-Founder*
- **Credo Group UK Ltd**, *Chief Executive Officer*
- **EQ Investors**, *Executive Director*
- **HFMC Wealth Group**, *Chief Operating Officer*
- **Handelsbanken Wealth Management**, *Client Director & Head of Private Office - North*
- **Investec Wealth & Investments**, *Head of Financial Planning*
- **Jefferies**, *Managing Director, COO & Head of Wealth Management*
- **Julius Baer International Ltd**, *Executive Director, Head of Wealth Planning*
- **Lloyds Private Banking**, *Senior Manager Online and International Advice, Wealth Planning & Advice*
- **Maseco Private Wealth**, *Head of Institutional*
- **Nedbank Private Wealth**, *Head of Private Banking UK*
- **Orbium Consulting Ltd**, *Head of Strategy and Change*
- **Phoenix Group**, *Customer Experience Manager*
- **Pictet & Cie (Europe) SA**, *Equity Partner, Group Managing Director*

- **Quartet Investment Manager**, *Managing Partner*
- **Rathbone Brothers Plc**, *Senior Financial Planner*
- **Sarasin & Partners LLP**, *Business Partner, Private Clients*
- **Seven Investment Management**, *Wealth Management Director*
- **Stonehage Fleming Group**, *Partner, Wealth Planning*
- **The Private Office**, *Partner, Head of Compliance*
- **UBS Wealth Management UK**, *Head of Wealth Planning Europe, Middle East and Africa*
- **Zurich UK**, *Head of Strategy Delivery UK Wealth Management*
- **Zurich UK**, *Retail and Performance Management*

BANK & BRANDS DISTRIBUTING FINANCIAL SERVICES

- **AllClear Insurance Services**, *Chief Executive Officer*
- **Axis Bank UK**, *Head of Retail Banking*
- **Bank of Ireland**, *Customer Experience Director*
- **Barclays Bank Plc**, *Head of New Product Propositions*
- **Beverley Building Society**, *Deputy CEO*
- **Bud**, *Head of Partnerships*
- **Cancer Research UK**, *Business Acquisition Manager*
- **Foresters Friendly Society**, *Membership Director*
- **HSBC Bank Plc**, *Head of Top Tier Wealth*
- **HSBC Bank Plc**, *Wealth Transformation Manager*
- **Hampshire Trust Bank**, *Chief Executive Officer*
- **Harpenden Building Society**, *Chief Executive Officer*
- **Immediate Media Co.**, *Business Development Manager - Money, Data & Transactions*
- **Immediate Media Co.**, *Head of Travel and Financial Services*
- **Loughborough Building Society**, *Chief Executive Officer*
- **Nationwide Building Society**, *Product Manager*
- **Nationwide Building Society**, *Proposition Strategy Manager*
- **Nationwide Building Society**, *Senior Product Strategy Manager - Protection, General Insurance & Investments*
- **Newcastle Building Society**, *Managing Director – Newcastle Financial Advisers*
- **Post Office Management Services**, *Commercial Trading Manager*
- **Post Office Money**, *Senior Product & Propositions Manager*
- **RateSetter**, *Head of Partnerships*
- **Restore UK**, *Chairman*
- **Royal London Asset Management - RLAM**, *Consumer Proposition Lead, Retirement and*

Investments

- **Saga Personal Finance**, *Head of Retirement*
- **Savings Champion**, *Head of Business Development*
- **Time Inc UK**, *Group Enterprise Director*
- **Time Inc UK**, *Head of Financial Services Partnerships - Advertising and E-Commerce*
- **Union Bank of India**, *Executive Director & Deputy CEO*
- **Virgin Money**, *Product Manager*
- **West Bromwich Building Society**, *Senior Product Manager Mortgages*

PARAPLANNERS

- **AFH Wealth Management**, *Paraplanner*
- **BdhSterling**, *Paraplanner*
- **Dawn Slater Wealth Management**, *Paraplanner*
- **GSI Wealth Management Ltd**, *Paraplanner*
- **Hughes & Co**, *Freelance Paraplanner*
- **MAP Financial Limited**, *Paraplanner*
- **Pharon Independent Financial Advisers Ltd**, *Paraplanner*
- **Premier Wealth Planning**, *Paraplanner*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Currencies Direct**, *Business Manager - Partnerships*
- **Currencies Direct**, *Head of Partnerships, UK*
- **Dignity**, *Senior Manager - Partnership Development*