

## Sponsors



FINANTIX



## Participant List

### PRIVATE BANKERS & WEALTH MANAGERS

- **Aberdeen Standard Capital (ASC)**, *Head of Operations*
- **Arbuthnot Latham & Co Ltd**, *Business Development Manager*
- **Arbuthnot Latham & Co Ltd**, *Director, Executive & Entrepreneurs*
- **Bank J. Safra Sarasin (Gibraltar) Ltd**, *Chief Operating Officer*
- **Bordier & Cie**, *Head of Operations*
- **Charles Stanley Plc**, *Chief Operating Officer*
- **Credo Group UK Ltd**, *Head of Operations & IT*
- **Deutsche Bank Wealth Management**, *Chief Operating Officer*
- **Heartwood Wealth Management**, *Head of Operations*
- **Hurley Partners Limited**, *Operations Director*
- **Hywin Wealth LLP**, *Chief Operating Officer*
- **JM Finn & Co Ltd**, *Head of Wealth Planning*
- **Julius Baer International Ltd**, *Data Scientist - Director*
- **Julius Baer International Ltd**, *Executive Director, Chief Operating Officer UK*
- **Julius Baer International Ltd**, *Head of Change*
- **Killik & Co**, *Partner, Chief Operating Officer*
- **London & Capital**, *Chief Digital Officer*
- **London & Capital**, *Partner, Chief Operating Officer*
- **MASECO Private Wealth**, *Chief Technology Officer*

- **Phoenix Group**, *Customer Experience Manager*
- **Pictet & Cie (Europe) SA**, *Chief Operating Officer UK Pictet Wealth Management*
- **RBC Wealth Management International**, *Head of Operations and Business Administration*
- **Rothschild & Co**, *Chief Operating Officer, Wealth*
- **Ruffer LLP**, *Chief Technology Officer*
- **SG Kleinwort Hambros Bank Ltd**, *Group Chief Operating Officer*
- **SandAire Ltd**, *Chief Operating Officer*
- **Saranac Partners Ltd**, *Head of Enterprise Technology*
- **Sarasin & Partners LLP**, *Partner, Chief Operating Officer*
- **Scalable Capital**, *UK Co-Founder & Chief Executive Officer*
- **Stonehage Fleming Group**, *Chief Operating Officer*
- **Tideway Investment Partners LLP**, *Chief Operating Officer*
- **Tyndall Investment Management**, *Chief Operating Officer*
- **Weatherbys Private Banking Ltd**, *Chief Technology Officer*
- **Whitefoord LLP**, *Partner, Chief Operating Officer*

## ADVISORY DISTRIBUTORS

- **Attivo Group**, *Chief Technology Officer*
- **Beaufort Group**, *Chief Operating Officer*
- **Discover Financial Group**, *Director*
- **EQ Investors**, *Head of Technology*
- **Grosvenor Wealth Management Ltd**, *Director*
- **Hargreaves Lansdown Group**, *Head of Advisory Operations*
- **LEBC Group**, *Group Operations Manager*
- **Origen Financial Services**, *Change Manager*
- **Origen Financial Services**, *Head of Operations*
- **Paradigm Norton**, *COO*
- **Sandringham Financial Partners**, *Chief Technology Officer*
- **Saunderson House**, *Chief Operating Officer*
- **Saunderson House**, *Head of Information Technology*
- **Succession Group Ltd.**, *Client Strategy Director*
- **Tavistock Investments Plc**, *Group Business Development Director*
- **Tenet Group**, *Group Operations Director*
- **The Private Office**, *Head of Innovation*
- **The Private Office**, *Operations Director*
- **Threesixty services LLP**, *Operations & Finance Director*

- **Wealth Wizards**, *Account Director*
- **Willis Owen**, *Managing Director*

## **BANK & BRANDS DISTRIBUTING FINANCIAL SERVICES**

- **Cambridge Building Society**, *Chief Operating Officer*
- **Furness Building Society**, *Head of Savings Strategy*
- **Harpenden Building Society**, *Head of IT*
- **Loughborough Building Society**, *Chief Executive Officer*
- **Post Office Money**, *Senior Group Strategy Manager*
- **Saffron Building Society**, *Chief Executive Officer*
- **Saffron Building Society**, *Interim Executive Director*
- **Savings Champion**, *Head of Marketing Operations*

## **SPONSORS & EXPERTS**

- **Finantix**, *Business Development Director EMEA*
- **Finantix**, *Founder and director*
- **Finantix**, *Relationship Manager*
- **InvestCloud Inc**, *EVP Business Development*