Sponsors

Participant List

- **Affinity Private Wealth**, *Chief Executive Officer*
- **Artorius Wealth Ltd**, *CEO*
- **Atomos (previously Sanlam Wealth)**, *Group Chief Executive Officer*
- **BRI Wealth Management Plc**, *Chairman*
- **Barclays Wealth & Investment Management UK**, *Managing Director & Global Head of Distribution for Banking and Credit Barclays Private Bank*
- **Beauclerc Advisory Services Ltd**, *Managing Partner*
- **Bedrock Group**, *Director - Investment Office*
- **Brewin Dolphin Ltd**, *Chief Strategist*
- **Brewin Dolphin Ltd**, *Chief of Staff*
- **Brewin Dolphin Ltd**, *Investment Director*
- **Cavendish Ware Wealth Management & Financial Planning**, *CIO & Head of Investment*
- **Credo**, *Director and Head: Private Clients*
- **Deutsche Bank Wealth Management**, *CEO - Head of Wealth Management*
- **Deutsche Bank Wealth Management**, *Deputy Chief Operating Officer*
- **EFG Private Bank Ltd**, *Deputy Chief Executive Officer*
- **Edmond de Rothschild**, *CEO Private Banking chez Edmond de Rothschild*
- **Evelyn Partners**, *Partner*

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- **Fintel (previously SimplyBiz Plc)**, *Managing Director*
- **Hassium Asset Management LLP**, *Managing Director and Chief Operating Officer*
- **Hawksmoor Investment Management Limited**, *Chief Executive Officer*
- **Hurst Point Group**, *Managing Director of Financial Planning*
- **J. Stern & Co LLP**, *Investment Specialist and Client Director*
- **JM Finn & Co Ltd**, *Chief Operating Officer, Investment Management*
- **JM Finn & Co Ltd**, *Chief Operating Officer*
- **Kleinwort Hambros**, *Group Chief Operating Officer*
- **Kleinwort Hambros**, *Head of Client Solutions Group*
- **London & Capital**, *Partner & Chief Executive Officer*
- **London & Capital**, *Partner & Head of the Private Investment Office*
- **MASECO Private Wealth**, *Senior Wealth Manager*
- **Murray Asset Management**, *Chief Executive*
- **Quilter Cheviot Investment Management**, *Executive Director - Head of Strategic Change*
- **Quilter Financial Planning**, *National Sales Director*
- **Rathbones Group Plc**, *Investment Director*
- **SEB**, *Head of International Private Banking Coverage*
- **SEB**, *Head of SEB 1856 UK*
- **Sarasin & Partners LLP**, *Chief Operating Officer, Client Affairs*
- **Sarasin & Partners LLP**, *Partner, Private Clients*
- **The C & D Partnership**, *Managing Partner*
- **Threesixty services LLP**, *Chief Executive Officer*
- **UBP - Union Bancaire Privee**, *Chief Operating Officer*
- **VAR Capital**, *Co-Founder & CEO*
- **WH Ireland**, *Chief Operating Officer (Wealth)*

SPONSORS & EXPERTS

- **Amundi ETF, Indexing and Smart Beta**, *Head of ETF, Indexing and Smart Beta Sales UK & Ireland*
- **Amundi ETF, Indexing and Smart Beta**, *Senior ESG Analyst*
- **Amundi ETF, Indexing and Smart Beta**, *Senior ETF Index & Smart Beta Sales*
- **EY**, *Partner - Head of Digital Customer Experience, EMEIA*
- **EY**, *Partner - UK Wealth Management Lead*
- **InvestCloud Inc**, *Chief Marketing Officer & Head of EMEA Business Development*
- **InvestCloud Inc**, *Head of Wealth Proposition, EMEA*
- **Lazard Asset Management**, *Managing Director, Head of Third Party Distribution*
- **Lazard Asset Management**, *Portfolio Manager/Analyst*
- **Lombard Odier Investment Managers**, *Head of UK Wholesale*

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- **Lombard Odier Investment Managers**
- **Mercer Global Investments**, *Alternatives Leader, UK*
- **Mercer Global Investments**, *Client Director, Wealth Management Europe*
- **Mercer Global Investments**, *Wealth Management Proposition Leader*
- **Ortec Finance**, *Managing Director of Business Development Goal Based Planning*
- **RBC Global Asset Management | BlueBay Asset Management**, *Associate Director, Financial Institutions UK and Ireland*
- **RBC Global Asset Management | BlueBay Asset Management**, *Head of UK Financial Institutions, BlueBay Asset Management*
- **RBC Global Asset Management | BlueBay Asset Management**, *Senior EM Sovereign Strategist*
- **SEI**, *Commercial Director, SEI Wealth Platform, UK*
- **SEI**, *Solutions and Service Director, SEI Wealth Platform*
- **Schroders Plc**, *Head of UK Intermediary*
- **Schroders Plc**, *Sales Director, Private Assets & Investment Trust*
- **Wellington Management International Ltd**, *Business Development Manager*
- **Wellington Management International Ltd**, *Portfolio Manager*
- **Wellington Management International Ltd**, *Relationship Analyst*

FACILITATORS & SPEAKERS

- **Aon Client Insight**, *Associate Partner, Client Insight*
- **Dundas Consultants Ltd**, *Director*
- **EY**, *Manager - Wealth & Asset Management*
- **Hannam & Partners**, *Consultant*
- **KPMG**, *Asset Management Consulting*
- **KPMG**, *Financial Services Wealth & Asset Management*
- **KPMG**, *Partner - Wealth & Asset Management*
- **Monumental Health**, *BPS Chartered and HCPC Registered Counselling Psychologist*
- **Owen James Group**, *Managing Director*
- **Provident Financial Group**, *Former Energy UK CEO and British Bankers' Association CEO*
- **Savanta**, *Director, Client Development*
- **Severn Trent Water**, *Group HR Director*
- **Sionic**, *Director - Wealth & Private Banking*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **BITA Risk**, *Global Head*
- **Independent Consultant**, *Strategic advisor to single family offices and business-owning families*

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- **KPMG**, *Assistant Manager Wealth & Asset Management Consulting*
- **KPMG**, *Management Consultant*
- **KPMG**, *Wealth Management professional*
- **Oakham Wealth Management**, *Chief Executive*
- **PIMFA**, *Director of Government Relations and Policy*
- **Sionic**, *Consultant*

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