

Sponsors



Participant List

- **Access Wealth Management**, *Partner*
- **Advisa Group**, *Director*
- **Aim Independent Limited A/R Kingswood Group**, *Managing Director*
- **Aisa Professional**, *Chairman of the Investment Committee*
- **Alan Boswell & Co Ltd**, *Director*
- **Applewood Independent Limited**, *Managing Director*
- **Arbuthnot Latham & Co Ltd**, *Senior Investment Manager*
- **Arbuthnot Latham & Co Ltd**, *Senior Private Banker*
- **Armstrong Watson Financial Planning Limited**, *Financial Planning Director – Operations & Commercial*
- **Atomos**, *Assistant Portfolio Manager*
- **Atomos**, *Portfolio Manager*
- **CAM Wealth Group**, *Financial Analyst*
- **CAM Wealth Group**, *Managing Director*
- **Canford & Castle Financial Planning**, *Director*
- **Clark Gillone A/R Finli Group**, *Director*
- **Corbel Partners**, *Adviser Liaison*
- **Corporate & Personal Investment Planning LTD**, *Chief Executive Officer*
- **FLP Group Ltd**, *Director & Independent Financial Planner*
- **FLP Group Ltd**, *Managing Director*
- **Fairstone Pensions & Wealth Management Services**, *Corporate Director*

- **Fairstone Private Wealth Limited**, *Divisional Director*
- **Financial Dimensions UK Ltd**, *Managing Director*
- **Five Wealth Ltd**, *Managing Director*
- **Flowers McEwan Limited**, *Director*
- **Gerrard Stuart Financial Services Limited**, *Director*
- **Grosvenor Wealth Management Ltd**, *Chief Operating Officer*
- **Grosvenor Wealth Management Ltd**, *Director*
- **IFT Wealth Management Ltd**, *Director*
- **Landmark IFA Ltd**, *Director*
- **Lifetime Financial Management Intermediaries Ltd**, *Communications Director*
- **Lockhart Consultancy Ltd**, *Director*
- **Lynas Vokes Investments Ltd**, *Managing Director*
- **Mindful Financial Planning**, *Director*
- **NatWest Group**, *Change Manager*
- **Nicholls Stevens (Financial Services) Limited**, *Managing Director*
- **OCM Wealth Management**, *CEO/CIO*
- **Paragon Financial Partners LLP**, *Partner*
- **Pavis Financial Management Limited**, *Managing Director*
- **Pensionhelp Limited**, *Managing Director*
- **Perspective Financial Group Limited**, *Internal Audit Manager*
- **PortfolioMetrix**, *Business Development*
- **Prime Wealth Solutions**, *Managing Director*
- **Professional Independent Wealth Advice (PIWA)**, *CEO & Founder*
- **Professional Independent Wealth Advice (PIWA)**, *Professional Independent Wealth Advice Ltd*
- **Prosperis Ltd**, *Managing Director*
- **Redmill Advance**, *Commercial Director*
- **Rice Whatmough Crozier LLP**, *Location Director and Consultant*
- **The Flower Group**, *Chief Executive Officer*
- **The Informed Partnership Ltd**, *Managing Director*
- **The Wealth Management Group Llp**, *Managing Partner*
- **True Wealth Group**, *Financial Planner*
- **True Wealth Group**, *Head of Key Projects*
- **Walden Capital**, *Chief Executive Officer*

SPONSORS & EXPERTS

- **Columbia Threadneedle Investments**, *Co-Head of UK Wholesale*
- **Columbia Threadneedle Investments**, *Head of UK Regional Sales*

- **Columbia Threadneedle Investments**, *Strategic and Technical Sales Manager*
- **Hymans Robertson Investment Services**, *Relationship Director*
- **Hymans Robertson Investment Services**, *Relationship Director*
- **LV=**, *Divisional Sales Manager*
- **LV=**, *Partnerships Development Manager*
- **Nedgroup Investments**, *Client Solutions Lead*
- **Nedgroup Investments**, *Head of Fixed Income*
- **Puma Investments**, *Investment Director*
- **Puma Investments**, *Senior Business Development Manager*
- **Standard Life UK (part of the Phoenix Group)**, *Head of Retail Distribution*
- **Standard Life UK (part of the Phoenix Group)**, *Head of Strategic Partnerships*
- **Tribe Impact Capital LLP**, *Head of Compliance*
- **Tribe Impact Capital LLP**, *Partner*
- **Tribe Impact Capital LLP**, *Partner*

FACILITATORS & SPEAKERS

- **Book of the Future**, *Author, speaker and applied futurist*
- **Bovill (Acquired by Ocorian)**, *Principal Consultant*
- **Catalyst Partners**, *Director*
- **Catalyst Partners**, *Partner*
- **Change Squared Ltd**, *Director of Progress*
- **Financial Conduct Authority**, *Head of Department (Advisers, Wealth and Pensions)*
- **Freelance**, *Journalist and consultant*
- **Independent Consultant**, *Director*
- **Independent Consultant**, *Freelance writer, editor and presenter*
- **Keynote Speaker**, *Political Editor*
- **Owen James Events**, *Managing Director*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Defaqto Ltd.**, *Chief Sales Officer*
- **Defaqto Ltd.**, *Head of Marketing*
- **Financial Conduct Authority**, *Manager*
- **Fintel**, *Head of Events*
- **Independent Consultant**, *Ex Head of European Sales at HanETF*