

A Meeting of Minds - Winning Advisers South 2024
Thursday 10 October 2024, Tyney Hall Hotel & Gardens, Ridge Lane, Hook, RG27 9AZ

Sponsors



Participant List

- **1st Financial Foundations**, *Director*
- **Advisa Group**, *Director*
- **Adviser Business Solutions**, *Director*
- **Aisa Professional**, *Chairman of the Investment Committee*
- **Aisa Professional**, *Director*
- **Aisa Retirement Planning**, *Partner*
- **Alan Boswell & Co**, *Director*
- **Blackstone Moregate**, *Chief Executive Officer*
- **Blackstone Moregate**, *Director*
- **Blaxsell Financial Planning**, *Director*
- **Broom Consultants**, *Director*
- **Broom Consultants**, *Managing Director*
- **Burlington Associates**, *Managing Director*
- **Cavendish Ware**, *Director*
- **Chiltern Consultancy**, *Managing Director*

- **Chris Leach & Associates**, *Managing Director*
- **Church's Financial Planning**, *Managing Director*
- **Clark Gillone**, *Director*
- **Clifton Asset Management**, *Group Business Development Manager*
- **Cormorant Partnership**, *Partner*
- **Crowe Financial Planning UK**, *Managing Director, Financial Planning*
- **Crowe Financial Planning UK**, *Operations Director*
- **Dartington Wealth Management**, *CEO*
- **Douglas Steers & Company**, *Director*
- **Druthers Financial Planning**, *Founder and Financial Planner*
- **Executive Advisory Services**, *Chairman*
- **Executive Advisory Services**, *Director*
- **Fairstone Financial Management**, *Office Principal/Financial Planner*
- **Fiducia Wealth Management**, *Director*
- **Fingerprint Financial Planning**, *Financial Planner & Principal Partner*
- **Finli**, *Director & Independent Financial Planner*
- **Generation Financial Services**, *Consultant*
- **Generation Financial Services**, *Director*
- **Goalkeep**, *Managing Director*
- **Grosvenor Corlett Bird**, *Director*
- **H V Financial Planning**, *Director*
- **HB Dobbin Financial Planning**, *Director*
- **Harding Financial**, *Managing Director*
- **Herbert & Webster**, *Managing Director*
- **Holden & Partners**, *Managing Partner*
- **Informed Choice**, *Managing Director*
- **Integrity365**, *Chief Executive Officer*
- **John Lamb Hill Oldridge**, *Managing Director*
- **Lynas Vokes Investments**, *Managing Director*
- **Matthew Douglas**, *Director*
- **Mclaren Capital**, *Managing Director*
- **Mindful Financial Planning**, *Director*
- **Moore Kingston Smith Financial Advisers**, *Chartered Financial Planner & Managing Director*
- **Newcastle Building Society**, *Financial Advice - Proposition Partner*
- **Nicholls Stevens**, *Managing Director*
- **Panacea Adviser**, *Chief Executive Officer*
- **Pharon Independent Financial Advisers**, *Compliance Director & Chartered Financial Planner*

- **Premier Financial Management**, *Director*
- **Richardsons Financial Services**, *Director*
- **Rouse**, *Director & Financial Planner*
- **S4 Financial**, *Managing Director*
- **Strategic Solutions Financial Services**, *Partner & Chartered Financial Planner*
- **Thomson Tyndall**, *Partner*
- **Timothy James and Partners**, *Director*
- **Timothy James and Partners**, *Financial Adviser*
- **Unbiased Financial Group**, *Chartered Wealth Manager*
- **Walden Capital**, *Chief Executive Officer*
- **Walden Capital**, *Director*
- **Wise Investment**, *Senior Financial Planner*

SPONSORS & EXPERTS

- **Albemarle Street Partners**, *Partnerships Manager*
- **Albemarle Street Partners**, *Strategic Partnership Manager*
- **BlackRock Investments**, *Head of the UK Adviser and Platform Sales Team at BlackRock*
- **Capital Group**, *Investment Director*
- **Capital Group**, *Managing Director Financial Intermediaries*
- **Capital Group**, *Managing Director, UK Financial Intermediaries*
- **Columbia Threadneedle Investments**, *Regional Sales Manager*
- **Columbia Threadneedle Investments**, *Solutions Sales Manager*
- **Columbia Threadneedle Investments**, *Strategic and Technical Sales Manager*
- **Fidelius**, *Commercial Director*
- **Fidelius**, *Director of Corporate Development*
- **Herrington Carmichael LLP**, *Partner, Corporate*
- **Herrington Carmichael LLP**, *Partner, Employment*
- **Hymans Robertson Investment Services**, *Relationship Director*
- **LGT Wealth Management**, *Head of Strategic Partners (UK & International)*
- **LGT Wealth Management**, *Lead Sustainable Portfolio Manager*
- **LV=**, *Divisional Sales Manager*
- **LV=**, *Partnerships Development Manager*
- **Scottish Widows**, *Head of Intermediary Platform Propositions*
- **Scottish Widows**, *Head of Intermediary Sales*
- **Standard Life UK (part of the Phoenix Group)**, *Business Development Manager South-West*
- **Standard Life UK (part of the Phoenix Group)**, *Business Development Manager – Retail Intermediary Distribution*

- **Timeline**, *Business Development Manager*
- **Timeline**, *Business Development Manager*
- **Transact**, *MPS Manager*
- **Tribe Impact Capital**, *Partner - Head of Adviser Team*
- **Tribe Impact Capital**, *Partner*

FACILITATORS & SPEAKERS

- **Bovill (Acquired by Ocorian)**, *Principal Consultant*
- **Catalyst Partners**, *Director*
- **Catalyst Partners**, *Partner*
- **Diary Detox**, *Founder*
- **Financial Conduct Authority**, *Head of Department (Advisers, Wealth and Pensions)*
- **Freelance**, *Journalist and consultant*
- **Keynote Speaker**, *Experienced educator, executive coach and leadership team coach*
- **Melo**, *Chief Innovation Officer & Director of Progress*
- **Mint Blue Consulting**, *Owner and Director*
- **Silverback Consultancy**, *Founder & Director*
- **Wild Ochre Consulting**, *Founder*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Financial Conduct Authority**, *Lead Associate*
- **Financial Conduct Authority**, *Lead Associate*
- **Financial Conduct Authority**, *Manager*
- **Financial Conduct Authority**, *Manager*
- **Independent Consultant**, *Solicitor, supporting financial advice firms in the UK*
- **The Flower Group**, *Chief Executive Officer*
- **VouchedFor**, *Managing Director*