

**Thursday 3 November**

**Schroder's Offices 31 Gresham St, London EC2V 7QA**

**Confirmed Participants:**

- **Absolute Financial Management** - *Director, Head of Research*
- **Affinity Independent Limited** - *Paraplanner*
- **Alan Boswell & Co Ltd** - *Financial Planner Assistant*
- **Alan Boswell & Co Ltd** - *Paraplanner*
- **Anthony Harding & Partners Ltd** - *Paraplanner*
- **Avocet Business Support** - *Financial Paraplanner*
- **Avocet Business Support** - *Director*
- **Baker Davies Ltd** - *Paraplanner*
- **Barwells Independent Financial Management Limited** - *Paraplanner*
- **Benchmark Capital** - *Group Director, Benchmark Capital*
- **BestInvest** - *Paraplanner*
- **BestInvest** - *Paraplanner*
- **Birchwood Investment Management Ltd** - *Paraplanner*
- **Broom Consultants Ltd** - *Paraplanner*
- **Broom Consultants Ltd** - *Paraplanner*
- **Certus Financial Planning Ltd** - *Paraplanner*
- **Chadney Bulgin** - *Assistant Paraplanner*
- **Close Brothers Asset Management** - *Technical Manager*
- **Close Brothers Asset Management** - *Group Technical Manager*
- **E- Paraplan** - *Head of Technical Operations*
- **E- Paraplan** - *Technical analyst*
- **Emery Little** - *Paraplanner*
- **Emery Little** - *Paraplanner*
- **Ergowealth Ltd** - *Graduate Trainee Paraplanner*
- **Foster Denovo** - *Paraplanner*

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- **Global QROPS** - *Paraplanner*
- **Global QROPS** - *Paraplanner*
- **Global QROPS** - *Paraplanner*
- **Griffins Financial Solutions Ltd** - *Senior Paraplanner*
- **GSI Wealth Management Ltd** - *Paraplanner*
- **GSI Wealth Management Ltd** - *Paraplanner*
- **Hase Osborne Asset Management Ltd** - *Paraplanner*
- **Hase Osborne Asset Management Ltd** - *Paraplanner*
- **Headley Financial Services Ltd** - *Paraplanner*
- **Headley Financial Services Ltd** - *Paraplanner*
- **HFM Columbus Group** - *Paraplanner*
- **HFM Columbus Group** - *Paraplanner*
- **HFM Columbus Group** - *Technical Adviser*
- **HFS Milbourne Financial Services** - *Paraplanner*
- **HFS Milbourne Financial Services** - *Technical Analyst*
- **Hugh James** - *Paraplanner*
- **Kingfurness & Associates Ltd** - *Operations Director*
- **KMG Independent Ltd** - *Paraplanner*
- **KMG Independent Ltd** - *Sales Support Administrator*
- **LEBC Group** - *Paraplanner*
- **Lewis Brownlee Financial Services Ltd** - *Paraplanner*
- **Lewis Brownlee Financial Services Ltd** - *Paraplanner*
- **LGT Vestra LLP** - *Paraplanner*
- **Lifetime Financial Management Intermediaries Ltd** - *Financial Planner and Senior Paraplanner*
- **Lifetime Wealth Management** - *Paraplanner*
- **Lifetime Wealth Management** - *Paraplanner*
- **Lorica Wealth Management** - *Paraplanner*
- **Lorica Wealth Management** - *Paraplanner*
- **Maskell Moss & Co Ltd** - *Paraplanner*
- **Maskell Moss & Co Ltd** - *Paraplanner*

- **Master Adviser IFA Ltd** - *Client Manager*
- **Master Adviser IFA Ltd** – *Paraplanner*
- **Mercer Jelf Financial Planning** - *Paraplanner*
- **Prydis Wealth Management Ltd** - *Paraplanner*
- **Prydis Wealth Management Ltd** - *Paraplanner*
- **Punter Southall Financial Management Ltd** - *Paraplanner*
- **Punter Southall Financial Management Ltd** - *Senior Paraplanner*
- **Regency Investment Services Ltd** - *Paraplanner*
- **Sanlam UK** - *Paraplanner*
- **Sanlam UK** - *Head of Paraplanning*
- **Satis Asset Management Ltd** - *Client Services Manager*
- **Smith & Williamson** - *Financial Planning Assistant*
- **Smith & Williamson** - *Financial Planner*
- **Smith & Williamson** - *Paraplanner*
- **SPF Private Clients** - *Senior Paraplanner*
- **Succession Group Ltd.** - *Paraplanner*
- **The Fry Group** - *Trainee Paraplanner*
- **The Private Office** - *Senior Paraplanner*
- **The Private Office** - *Paraplanner*
- **The Private Office** - *Paraplanner*
- **The Woodham Partnership Limited** - *Outsourced Paraplanner & Compliance Director*
- **Thomas Miller Investment Ltd** - *Senior Paraplanner*
- **Timeline Wealth Management** - *Paraplanner & Compliance Support*
- **Timothy James & Partners Ltd** - *Support Executive*
- **Timothy James & Partners Ltd** - *Finance Executive*
- **Timothy James & Partners Ltd** - *Finance Executive*
- **Timothy James & Partners Ltd** - *Support Executive*
- **Towry** - *Wealth Planner*
- **Towry** - *Senior Paraplanner*
- **TWP Wealth Ltd** - *Paraplanner*
- **VouchedFor** - *Managing Director & Founder*
- **Willis Owen** - *Research Analyst*

- **Willis Owen** - *Head of Research*
- **Wingate Financial Planning** - *Paraplanning Team Manager*
- **Zen Wealth LLP** - *Paraplanner*

### **Speakers and Representatives:**

- **Affinia Partnerships** - *Director*
- **Benchmark Capital** - *Group Director, Benchmark Capital*
- **INVESCO Perpetual** - *Fixed Interest Product Direct*
- **INVESCO Perpetual** - *Fund Manager*
- **INVESCO Perpetual** - *Regional Sales Manager - Nationals & Networks*
- **INVESCO Perpetual** - *Product Director*
- **INVESCO Perpetual** - *Multi Asset Product Director*
- **INVESCO Perpetual** - *Sales Account Manager*
- **INVESCO Perpetual** - *Marketing Communications Specialist*
- **INVESCO Perpetual** - *Events Specialist*
- **INVESCO Perpetual** - *Client Relationship Manager*
- **John Chapman Consulting** - *Consultant*
- **Kings Court Trust** - *Sales Director*
- **Momentum Global Investment Management Limited** - *Head of UK Retail Sales*
- **Schroders Plc** - *Fund Manager*
- **Schroders Plc** - *Senior European Economist*
- **Schroders Plc** - *Investment Specialist, Equity Value*
- **Schroders Plc** - *Fund Manager*
- **Schroders Plc** - *Marcus Brookes, Head of Multi Manager*
- **Schroders Plc** - *Stuart Podmore, Investment Propositions Director*
- **Square Mile Investment Consulting and Research Limited** - *Jamie Farquhar, Director of Distribution*
- **Verbatim Asset Management** - *Dan Russell, Managing Director*