

Tuesday 8 November

The Mere Golf Resort and Spa, Knutsford, Cheshire WA16 6LJ

Confirmed Participants:

- **75Point3 Chartered Financial Planners** - *Head of Paraplanning*
- **75Point3 Chartered Financial Planners** - *Paraplanner*
- **Alexander House Financial Services Ltd.** - *Paraplanning Manager*
- **Ark Financial Adviser** - *Trainee Advisor*
- **BlueTrust** - *Paraplanner*
- **Burton and Fisher Financial Services** - *Paraplanner*
- **Burton and Fisher Financial Services** - *Paraplanner*
- **Bury Independent Financial Advisers Limited** - *Paraplanner*
- **Bury Independent Financial Advisers Limited** - *Paraplanner*
- **Castlefield Advisory Partners** - *Paraplanner*
- **Chadwicks** - *Paraplanner*
- **Chadwicks** - *Paraplanner*
- **Clarion Wealth Planning** - *Head of Paraplanning*
- **Clear Cut Financial Planning** - *Support Paraplanner*
- **Clear Cut Financial Planning** - *Support Paraplanner*
- **Clear Cut Financial Planning** - *Paraplanner*
- **Close Brothers Asset Management** - *Assistant Technical Manager*
- **Equilibrium Asset Management LLP** - *Senior Client Manager (Paraplanner)*
- **Greystone Financial Services Ltd** - *Paraplanner*
- **Greystone Financial Services Ltd** - *Paraplanner*
- **Kellands** - *Paraplanner*
- **Kellands** - *Paraplanner*
- **LEBC Group** - *Technical & Research Manager*
- **LEBC Group** - *Group Paraplanning Manager*
- **Octogan Financial Advisers** - *Director*
- **Paradigm Group** - *Investment Development Consultant*
- **PLUS Group** - *Director*

- **Rice Whatmough Crozier LLP** - Senior Associate
- **Rice Whatmough Crozier LLP** - Associate
- **Saint & Co** - Paraplanner
- **Saint & Co** - Trainee Paraplanner
- **Saint & Co** - Paraplanner
- **Sandringham Financial Partners** - Paraplanner
- **The Private Office** - Paraplanner
- **The Private Office** - Paraplanner
- **Tilney BestInvest** - Head of Paraplanning
- **West Park Investment Partnership** - Senior Paraplanner/ Financial Adviser

Speakers and Representatives:

- **Benchmark Capital** - Group Director, Benchmark Capital
- **Compliance First Ltd** - Managing Director
- **Cris Beswick Consulting** - Strategic Advisor on Innovation and Author of 'Building a Culture of Innovation'
- **INVESCO Perpetual** - Regional Sales Manager - Nationals & Networks
- **INVESCO Perpetual** - Interest Product Strategist
- **INVESCO Perpetual** - Multi Asset Product Director
- **INVESCO Perpetual** - Fund Manager
- **INVESCO Perpetual** –Sales Account Manager
- **INVESCO Perpetual** –Events Specialist
- **INVESCO Perpetual** –Associate Director, Financial Institutions Group
- **Momentum Global Investment Management Limited** - Head of UK Retail Sales
- **Schroders Plc** - Fund Manager
- **Schroders Plc** - Investment Propositions Director
- **Schroders Plc** - Head of Multi Manager
- **Square Mile Investment Consulting and Research Limited** - Client Relationship Manager

