

Paraplanning Excellence

Tuesday 1 November 2022, Schroders Offices, 1 London Wall Place, Barbican, London, EC2Y 5AU

Sponsors



Participant List

- **Adsumus Financial Services**, *Head of Operations & Paraplanning Partner*
- **Apropos Wealth Management Ltd**, *Financial Planner*
- **Apropos Wealth Management Ltd**, *Paraplanner*
- **Arbuthnot Latham & Co Ltd**, *Wealth Planner*
- **Ark Financial Adviser**, *Trainee Advisor*
- **Blackstone Moregate Ltd**, *Paraplanner*
- **Blevins Franks Financial Management Limited**, *Financial Planner*
- **Blevins Franks Financial Management Limited**, *Financial Planning Assistant*
- **Blevins Franks Financial Management Limited**, *Paraplanner*
- **Brewin Dolphin Ltd**, *FP Operations Manager*
- **Brewin Dolphin Ltd**, *Planner - Wealth Planning*
- **Broadstone Ltd**, *Paraplanner*
- **Broom Consultants Ltd**, *Office Manager*
- **Broom Consultants Ltd**, *Paraplanner and Financial Adviser*
- **Broom Consultants Ltd**, *Paraplanner*
- **Broom Consultants Ltd**, *Paraplanner*
- **Broom Consultants Ltd**, *Trainee Financial Administrator*
- **Canaccord Genuity Wealth Management**, *Senior Paraplanner*
- **Cavendish Medical Ltd**, *Senior Assistant Financial Planner*
- **Church's Financial Planning**, *Trainee Planner*
- **City Asset Management Plc**, *Paraplanner*
- **Clark Gillone**, *Paraplanner/Financial Planner Support*
- **Clark Gillone**, *Paraplanner*
- **Close Brothers Asset Management**, *Paraplanner*

- **Crown Wealth Management Limited**, *Paraplanner*
- **Dentons Investment Services Ltd**, *Technical Advisory Support Manager*
- **EQ Investors Limited**, *Head of Technical Consulting*
- **Fairstone Financial Management Ltd**, *Paraplanner*
- **Fensham Howes Ltd**, *Chartered Financial Planner*
- **Fidelius**, *Client Service Manager*
- **Fleet Street Wealth**, *Paraplanner*
- **Foster Denovo**, *Paraplanner Team Leader*
- **Foster Denovo**, *Senior Paraplanner*
- **Gerrard Stuart Financial Services Limited**, *Senior Paraplanner*
- **Goodman Chartered Financial Planners**, *Paraplanner*
- **Goodman Chartered Financial Planners**, *Paraplanner*
- **Griffins Financial Solutions Ltd**, *Paraplanner*
- **HFMC Wealth Limited**, *Senior Technical Consultant*
- **HFMC Wealth Partners LLP**, *Chartered Financial Planner and Senior Technical Consultant*
- **HFMC Wealth Partners LLP**, *Technical Consultant.*
- **Handelsbanken Wealth Management**, *Head of Wealth Planning*
- **Haven Paraplanning Ltd**, *Director and Paraplanner*
- **Homecroft Financial Management Limited**, *Paraplanner*
- **Hughes & Co**, *Outsourced Paraplanner*
- **Independent**, *Paraplanner*
- **Informed Choice Ltd**, *Head of Paraplanning*
- **Integrity365**, *Paraplanner*
- **Intelligent Capital Ltd**, *Paraplanner*
- **Investec Wealth & Investments**, *Head of Paraplanning and Support*
- **Investec Wealth & Investments**, *Paraplanner*
- **Investec Wealth & Investments**, *Senior Paraplanner*
- **Investment Quorum Ltd**, *Associate Wealth Manager*
- **Investment Quorum Ltd**, *Paraplanner*
- **Investment Quorum Ltd**, *Trainee Paraplanner*
- **Investment Solutions Wealth Management Ltd**, *Director & Chartered Financial Planner*
- **Investment Solutions Wealth Management Ltd**, *Paraplanning Manager*
- **JM Finn & Co Ltd**, *Paraplanner*
- **King Financial Planning - AR of Tavistock**, *Paraplanner*
- **LEBC Group Limited**, *Paraplanner Team Leader*
- **Landmark IFA Ltd**, *Paraplanner*
- **Lewis Brownlee Financial Services Ltd**, *Paraplanner*

- **London & Capital**, *Paraplanner*
- **Matthew Douglas Ltd**, *Client services executive*
- **Matthew Douglas Ltd**, *Trainee Paraplanner/Administrator*
- **Metis Wealth Ltd**, *Paraplanner*
- **NLP Financial Management Ltd**, *Senior Paraplanner*
- **Nedbank Private Wealth**, *Paraplanner*
- **New Leaf Distribution**, *Compliance Officer*
- **New Leaf Distribution**, *Director*
- **New Leaf Distribution**, *Trainee Paraplanner*
- **Origen Financial Services**, *Paraplanner Manager*
- **Parkgate FS LLP**, *Financial Adviser*
- **Pharon Independent Financial Advisers Limited**, *Chartered Financial Planner and Paraplanner Manager*
- **Pharon Independent Financial Advisers Limited**, *Paraplanner*
- **Pharon Independent Financial Advisers Limited**, *Paraplanner*
- **Primera Wealth Management**, *Director (Operations)*
- **Prismatic Wealth Limited**, *Head of Paraplanning*
- **Quilter plc**, *Head of Adviser & Client Support*
- **Quilter plc**, *Paraplanning Operations Manager*
- **Quilter plc**, *Technical Manager*
- **Raymond James Investment Services Ltd**, *Senior Paraplanner*
- **S G Financial Services**, *Paraplanner*
- **SG Wealth Management**, *Paraplanner Manager*
- **SG Wealth Management**, *Paraplanner*
- **Saltus Partners LLP**, *Paraplanner*
- **Saltus Partners LLP**, *Paraplanner*
- **Saunderson House Limited**, *Associate Financial Planner*
- **Saunderson House Limited**, *Paraplanner*
- **Smith & Williamson**, *Paraplanner*
- **St. James's Place Wealth Management Group**, *Head of Business Improvement*
- **Stonehage Fleming Group**, *Paraplanner*
- **Stonehage Fleming Group**, *Paraplanner*
- **The Fry Group**, *Paraplanner*
- **The Private Office**, *Paraplanner*
- **The Private Office**, *Paraplanner*
- **Timothy James and Partners Ltd**, *Finance Executive*
- **Timothy James and Partners Ltd**, *Paraplanner*

- **Timothy James and Partners Ltd**, *Paraplanner*
- **Timothy James and Partners Ltd**, *Senior Paraplanner/ Senior Finance Executive*
- **Timothy James and Partners Ltd**, *Support Executive*
- **True Wealth Planning Solutions Ltd**, *Head of Financial Planning Analysis*
- **Vision Independent Financial Planning Ltd**, *Regulated Support Officer & Paraplanner*
- **WH Ireland**, *Director, Head of Wealth Planning*
- **Walden Capital**, *Senior Paraplanner*
- **Wingate Wealth Management Ltd**, *Paraplanning Team Manager*