

A Meeting of Minds - Wealth Management & Private Banking XXVII  
Thursday 10 September 2020, The Berkeley Hotel, Wilton Place, London SW1X 7RL

## Sponsors



## Participant List

### BUSINESS STRATEGY

- **AIB Private Banking**, *Head of Lending and Operations*
- **Affinity Private Wealth**, *Chief Executive Officer*
- **BOS Wealth Management Europe - UK Branch**, *Managing Director, Private Banking*
- **BRI Wealth Management Plc**, *Chief Executive Officer*
- **Bordier & Cie**, *Chief Executive Officer*
- **Brewin Dolphin Ltd**, *Head of Strategic Projects*
- **Canaccord Genuity Wealth Management**, *Chief Executive Officer*
- **Coutts & Co**, *Executive Director, Head of Business Delivery & Transformation*
- **Credo Group UK Ltd**, *Chief Executive Officer*
- **Falcon Private Wealth Ltd**, *Managing Director, Chief Executive Officer*
- **Fideuram Intesa Sanpaolo Private Banking**, *General Manager, Head of Private Banking UK*
- **Goldman Sachs**, *Chief Supervisory Officer*
- **Hawksmoor Investment Management Ltd**, *Chief Executive Officer*
- **IPS Capital LLP**, *Chief Executive Officer*
- **Jefferies**, *Managing Director, COO & Head of Wealth Management*
- **LGT Vestra LLP**, *Business Strategist*
- **Lockhart Capital Management LLP**, *Chief Executive Officer & Founding Partner*

- **London & Capital**, *Partner, Chief Operating Officer*
- **Marshall Street Advisors**, *Founding Partner*
- **Nedbank Private Wealth**, *Chief Executive Officer*
- **Owl Private Office LLP**, *Partner*
- **Quilter Cheviot Investment Management**, *Managing Director*
- **SG Kleinwort Hambros Bank Ltd**, *Head of Governance and Accountability*
- **SG Kleinwort Hambros Bank Ltd**, *Managing Director, Head of Private Banking*
- **Sanlam UK**, *Group Chief Executive Officer*
- **Saranac Partners Ltd**, *Managing Partner*
- **Sarasin & Partners LLP**, *Chief Operating Officer, Client Affairs*
- **Sarasin & Partners LLP**, *Managing Partner*
- **Smith & Williamson**, *Partner, Family Office Services*
- **Standard Chartered Bank**, *Head of Wealth Management and WMPS, Europe*
- **Stonehage Fleming Group**, *Chief Operating Officer*
- **The C & D Partnership**, *Managing Partner*
- **Vestrata**, *Head of Solutions*
- **WH Ireland**, *Strategy and Change Director*
- **Waverton Investment Management Ltd**, *Chief Executive Officer*
- **Weatherbys Private Banking Ltd**, *Head of Private Banking*

## INVESTMENT

- **AIB Private Banking**, *Head of Private Wealth*
- **Barclays Wealth**, *Chief Investment Officer*
- **Brewin Dolphin Ltd**, *Head of Research*
- **Cavendish Ware Wealth Management & Financial Planning**, *CIO & Head of Investment*
- **Credo Group UK Ltd**, *Chief Investment Officer*
- **HSBC Private Bank (UK) Ltd**, *Managing Director, Global Head of Funds & ETFs, Managed Investment Solutions*
- **Hassium Asset Management LLP**, *Managing Director*
- **Hawksmoor Investment Management Ltd**, *Senior Investment Manager*
- **Hay Hill Wealth Management**, *Chief Investment Officer*
- **Independent**, *Former Managing Director, Global Head of GFG*
- **Investec Wealth & Investments**, *Head of Strategy, Investec Wealth & Investment*
- **JM Finn & Co Ltd**, *Deputy Head of Investment Management*
- **MASECO Private Wealth**, *Senior Wealth Manager*
- **Nutmeg Savings and Investments**, *Senior Investment Manager and Director of Investment Strategy*

- **SandAire Ltd**, *Chief Investment Officer*
- **Schroders Personal Wealth**, *Head of Investment Specialists - Chief Investment Office*
- **Stenham Asset Management Inc**, *Head of Investment Research*
- **Tilney Group**, *Investment Director*
- **Wren Investment Office Ltd**, *Client Relationship Director*

## **FACILITATORS & SPEAKERS**

- **Orbium**, *Associate Director*