

RETIREMENT MATTERS

Tuesday 17 October 2023, Royal College of Physicians, 11 St Andrews Pl, London NW1 4LE

Sponsors



Participant List

- **AFH Wealth Management**, *Chief Advice Officer*
- **Age Partnership Wealth Management Limited**, *Exec Director Corporate Partnerships & Wealth Management*
- **Amber River**, *Group Investment Director*
- **Applewood Independent Limited**, *Managing Director*
- **Aspira Corporate Solutions Limited A/R LEBC**, *Regional Manager - South & South West*
- **Atomos (previously Sanlam Wealth)**, *Co Founder and CEO of My Time*
- **Atomos (previously Sanlam Wealth)**, *Head of Wealth Planning*
- **Attivo Group**, *Financial Planning Director*
- **Broadstone Ltd**, *Investment Director*
- **Brooks Macdonald Group Plc**, *Head of Private Clients*
- **Broom Consultants Ltd**, *Director*
- **Broom Consultants Ltd**, *Managing Director*
- **Brown Shipley & Co Limited**, *Head of Wealth Planning*
- **Charles Stanley Plc**, *Managing Director - Charles Stanley Central Financial Services*
- **City Asset Management Plc**, *Director, Head of Financial Planning*
- **Co-op Group**, *Senior Sales & Partnership Manager - Estate Planning*
- **Covenham Financial Services Ltd**, *Director IFA*
- **Elevation Wealth Management Ltd**, *Director - London & South East*
- **Elevation Wealth Management Ltd**, *Group Managing Director*
- **Executive Advisory Services Limited**, *Chairman*
- **Executive Advisory Services Limited**, *Director*
- **Fidelity International**, *Head Of Wealth Management Advice*
- **Fidelity International**, *Head of Wealth, UK Financial Services*

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- **Generation Financial Services Ltd**, *Consultant*
- **HSBC Global Asset Management (UK) Limited**, *Head of Fintech, Venture & Growth Investments, HSBC Asset Management*
- **Hearnden Associates Limited (Postcode: RH7 6BH)**, *Chartered Financial Planner*
- **Hearnden Associates Limited (Postcode: RH7 6BH)**, *Director*
- **Hearnden Associates Limited (Postcode: RH7 6BH)**, *Independent Financial Adviser*
- **Helm Godfrey Partners Ltd**, *Chairman of the Board*
- **Hurst Point Group**, *Managing Director, Financial Planning*
- **Isio**, *Head of Wealth Proposition Development*
- **Julius Baer International Ltd**, *Wealth Planner*
- **Kellands (Gloucester) Limited**, *General Manager*
- **King Financial Planning - AR of Tavistock**, *Managing Partner*
- **Kingswood**, *Regional Manager*
- **Lacomp Plc**, *Managing Director*
- **Lockhart Capital Management LLP**, *Head of Client Advice*
- **M&G Wealth Advice**, *Head of Remote Sales & Business Development*
- **MASECO Private Wealth**, *Partner & Wealth Manager*
- **MWA Financial**, *Executive Chairman*
- **Makemson & Company Limited**, *Co-Director*
- **Mattioli Woods Plc**, *Business Development Director*
- **Mazars Financial Planning Limited**, *Head of Financial Planning Ltd*
- **Mazars Financial Planning Limited**, *Proposition Manager*
- **Nedbank Private Wealth**, *Head of Wealth Planning*
- **New Leaf Distribution**, *Principal & Founder*
- **Nicholls Stevens (Financial Services) Limited**, *Managing Director*
- **Oakfield Financial Services Limited**, *Managing Director*
- **Openwork Limited**, *Wealth Proposition Director*
- **Origen Financial Services**, *Director, Proposition and Marketing*
- **PK Group London**, *Partner and CEO*
- **Parmenion Capital Partners LLP**, *Head of Product (Retirement and Wealth Planning)*
- **Penney, Ruddy & Winter Ltd**, *Director*
- **Pharon Independent Financial Advisers Limited**, *Director*
- **Pi Financial Ltd**, *Chief Executive Officer*
- **Rathbones Group Plc**, *Technical Support Specialist*
- **Redington**, *Senior Vice President, DC & Financial Wellbeing*
- **Retirement Line**, *Chief Executive Officer*
- **Retirement Line**, *Director of Propositions & Corporate Partnerships*

- **Society of Later Life Advisers**, *Founder and Joint Chair*
- **Stonehage Fleming Group**, *Director - Wealth Planning*
- **Stonehage Fleming Group**, *Partner - Head of Wealth Planning*
- **Succession Wealth**, *Managing Director*
- **Tenet Group**, *CEO*
- **Timothy James and Partners Ltd**, *Financial Consultant*
- **Timothy James and Partners Ltd**, *Pension Specialist*
- **Willis Owen Limited**, *Head of Investment, Product & Regulatory Affairs*
- **Wingate Wealth Management Ltd**, *Founding Director & Chartered Financial Planner*
- **Wren Sterling Financial Planning Limited**, *Independent Financial Adviser*

SPONSORS & EXPERTS

- **HUB Financial Solutions**, *Business Development Director*
- **Kidbrooke**, *Director at Kidbrooke Technologies Ltd*
- **Kidbrooke**, *Head of Business Development*

FACILITATORS & SPEAKERS

- **Alpha FMC**, *Management Consultant Wealth & Asset Management*
- **Bovill**, *Principal Consultant*
- **Consultant**, *Generations Expert, Historian of Contemporary Values*
- **Independent Consultant**, *Ex Head of UK Distribution at Carmignac*
- **Independent**, *Project Director*
- **Savanta**, *Director, Client Development*
- **Savanta**, *Director*