

RETIREMENT MATTERS

Wednesday 25 September 2024, Royal College of Physicians, 11 St Andrews Pl, London NW1 4LE

Sponsor



Participant List

- **Age Partnership Wealth Management Limited**, *Exec Director Corporate Partnerships & Wealth Management*
- **Ascot Lloyd**, *Chief Commercial Officer*
Ascot Lloyd, *Investment Director*
- **Atomos**, *Co Founder and CEO of My Time*
- **Atomos**, *Head of Financial Planning*
- **Attivo Group**, *Head of Financial Planning*
- **Atwoods**, *Managing Director*
- **Bespoke-Advice**, *Head of London Office & Wealth Planning Director*
- **Bordier & Cie**, *Head of Wealth Planning*
- **Bowmore Financial Planning**, *Managing Director*
- **Brewin Dolphin**, *Planner - Wealth Planning*
- **Broadstone**, *Investment Director*
- **Broom Consultants**, *Director*
- **Canaccord Genuity Wealth Planning**, *Director of Wealth Planning*
- **Canaccord Genuity Wealth Planning**, *Head of Wealth Planning*
- **Cavendish Medical**, *Chief Executive Officer*
- **Cavendish Ware**, *Associate Director*
- **Cavendish Ware**, *Director*
- **Cazenove Capital Management**, *Head of Wealth Planning*
- **Charles Stanley**, *Managing Director - Charles Stanley Central Financial Services & Chief Client Officer*
- **Citi Private Bank**, *Head of Wealth Planning*

- **City Asset Management**, *Director, Head of Financial Planning*
- **Co-op Group**, *Senior Sales & Partnership Manager - Estate Planning*
- **Connor Broadley**, *Chief Operating Officer*
- **Continuum**, *Head of Partnership Development*
- **Corpad Wealth Management**, *Director of Financial Planning*
- **Covenham Financial Services**, *Director IFA*
- **De Carteret Wealth**, *Chief Executive Officer*
- **EBCam Limited**, *Managing Director*
- **Elevation Wealth Management**, *Director - London & South East*
- **Evelyn Partners**, *Financial Planning - Director*
- **Executive Advisory Services**, *Chairman*
- **FLP Group**, *Director & Independent Financial Planner*
- **Generation Financial Services**, *Director*
- **HSBC Bank**, *Senior Customer Journey Lead - Build Investments & Financial Planning*
- **HSBC Bank**, *Strategy - Wealth & Retirement*
- **Harding Financial**, *Managing Director*
- **Hargreaves Lansdown Asset Management**, *Senior Analyst*
- **Hearnden Associates**, *Chartered Financial Planner*
- **Hearnden Associates**, *Director*
- **Hearnden Associates**, *Independent Financial Adviser*
- **IFT Wealth Management**, *Director*
- **IM Asset Management**, *CEO*
- **Investment Solutions Wealth Management**, *Director*
- **Isio**, *Head of Wealth Proposition Development*
- **Julius Baer International**, *Director & Wealth Planner*
- **Kellands**, *Executive Chairman*
- **Kellands**, *General Manager*
- **Killik & Co**, *Partner & Head of Wealth Planning*
- **King Financial Planning**, *Managing Partner*
- **Kingswood**, *Chief Operating Officer*
- **Legal & General Retail**, *Head of At Retirement Proposition - workplace*
- **Lockhart Capital Management**, *Head of Client Advice*
- **MASECO Private Wealth**, *Head of Advanced Planning*

- **MASECO Private Wealth**, *Partner & Wealth Manager*
- **MI Capital Research**, *Head of Research*
- **MKC Wealth**, *Compliance Director*
- **Mattioli Woods**, *Strategic Partnerships Director*
- **Mazars Financial Planning**, *Head of Financial Plannin*
- **Mazars Financial Planning**, *Proposition Manager*
- **Mclaren Capital**, *Executive Director*
- **Mclaren Capital**, *Managing Director*
- **Nedbank Private Wealth**, *Head of Wealth Planning*
- **New Leaf Distribution**, *Investment Director*
- **New Leaf Distribution**, *Principal & Founder*
- **Nicholls Stevens**, *Managing Director*
- **Oakfield Financial Services**, *Managing Director*
- **Octopus MoneyCoach**, *Managing Director & Founder (CEO of Vouchedfor)*
- **PK Financial Planning**, *Director*
- **Pembroke Financial Services**, *Head of Advice Proposition*
- **Penney, Ruddy & Winter**, *Director*
- **Pennymatters Limited**, *Independent Financial Adviser*
- **Pensionhelp Limited**, *Managing Director*
- **Pharon Independent Financial Advisers Limited**, *Director*
- **Pi Financial**, *Chief Executive Officer*
- **Punter Southall Focus**, *Chief Executive Officer*
- **Rathbones Group**, *Regional Manager*
- **Rathbones Group**, *Technical Support Specialist*
- **Redington**, *Senior Vice President, DC & Financial Wellbeing*
- **Retirement Line**, *Director of Propositions & Corporate Partnerships*
- **Sandringham Financial Partners**, *Chartered Advising Partner*
- **Sesame Bankhall Group**, *CEO (interim)*
- **Sesame Bankhall Group**, *Head of Wealth Propositions*
- **Stonehage Fleming Group**, *Director - Wealth Planning*
- **Stonehage Fleming Group**, *Partner - Head of Wealth Planning*
- **Tavistock Investments**, *Corporate Development Director*
- **The Flower Group**, *Chief Executive Officer*
- **Timothy James and Partners**, *Director*
- **Timothy James and Partners**, *Financial Adviser*
- **Titan Wealth Planning**, *Head of Proposition*

- **Union Bank of India**, *Non Executive Director*
- **Unique Financial Planning**, *Chief Executive Officer*
- **WH Ireland**, *Wealth Planner*
- **Walden Capital**, *Director*
- **Willis Owen Limited**, *Head of Investment, Product & Regulatory Affairs*
- **Wise Investment**, *Paraplanner*
- **Wise Investment**, *Senior Financial Planner*

FACILITATORS & SPEAKERS

- **Bovill (Acquired by Ocorian)**, *Principal Consultant*
- **Catalyst Partners**, *Partner*
- **Crane Consulting**, *Consultant*
- **Freelance**, *Journalist and consultant*
- **Independent**, *Project Director*
- **Lane Clark & Peacock**, *Partner and ex Pensions Minister*
- **Tata Consultancy Services (TCS)**, *Head of UK FS Customer Transformation*