

WEALTHTECH MATTERS

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Participant List

ADVISORY DISTRIBUTORS

- **Beaufort Group**, *Chief Operating Officer*
- **Coutts & Co**, *Head of Financial Planning & Client Needs and Advice Journey Owner*
- **Dolphin**, *Chief Marketing Officer*
- **Fusion Asset Management**, *Head of Investment Solutions*
- **Grosvenor Wealth Management Ltd**, *Director*
- **LEBC Group**, *Managing Director (Bionic)*
- **Paradigm Norton**, *COO*
- **Sandringham Financial Partners**, *Chief Technology Officer*
- **Saunderson House**, *Chief Operating Officer*
- **Schroders Plc**, *Chief Technology Officer*
- **Succession Wealth**, *Chief Client Officer*
- **Tenet Group**, *Group Operations Director*
- **Tilney Group**, *Head of Software Engineering*
- **Validpath Ltd**, *Network Development Director*
- **Wealth Wizards**, *Chief Commercial Officer*
- **Willis Owen**, *Head of Product & Compliance*

PRIVATE BANKERS & WEALTH MANAGERS

- **Aberdeen Standard Capital (ASC)**, *Head of Client Service*
- **Aberdeen Standard Investments**, *Head of Change & Transformation*

- **Arbuthnot Latham & Co Ltd**, *Business Development Manager*
- **Artorius Wealth Ltd**, *Chief Operating Officer*
- **BRI Wealth Management Plc**, *System Developer*
- **Bank J. Safra Sarasin (Gibraltar) Ltd**, *Change Manager*
- **Brown Shipley & Co Ltd**, *Chief Operating Officer*
- **Capital Generation Partners LLP**, *Chief Operating Officer*
- **Coutts & Co**, *Chief Operating Officer*
- **Coutts & Co**, *Head of Digital, Design & Experience*
- **Coutts & Co**, *Head of Front Office Transformation*
- **Coutts & Co**, *Journey Design Manager and Product Owner*
- **Credit Suisse Private Bank**, *Head of Front Services*
- **Credo Group UK Ltd**, *Head of Operations & IT*
- **JM Finn & Co Ltd**, *Deputy Head of Investment Management*
- **JM Finn & Co Ltd**, *Head of Wealth Planning*
- **Jefferies**, *Managing Director, COO & Head of Wealth Management London*
- **& Capital**, *Chief Digital Officer*
- **London & Capital**, *Head of Operations – US Family Office*
- **MASECO Private Wealth**, *Partner, Chief Operating Officer*
- **Odey Wealth Management (UK) Limited**, *Head of Operations*
- **Quilter Cheviot Investment Management**, *Head of Operations*
- **Quilter Cheviot Investment Management**, *Managing Director*
- **RBC Wealth Management International**, *Chief Operating Officer*
- **RBC Wealth Management**, *CIO & Head of Technology*
- **Rathbone Brothers Plc**, *Chief of Staff*
- **Rathbone Brothers Plc**, *Investment Manager*
- **Redmayne-Bentley LLP**, *Director of IT*
- **Ruffer LLP**, *Chief Technology Officer*
- **Ruffer LLP**, *Partner, Chief Operating Officer*
- **Saltus Partners LLP**, *Chief Operating Officer*
- **Saranac Partners Ltd**, *Head of Governance*
- **Saranac Partners Ltd**, *Partner, Chief Operating Officer*
- **Schroders Personal Wealth**, *Head of Advice Strategy*
- **Signia Wealth Ltd**, *Chief Operating Officer and Finance Director*
- **Sionic**, *Partner*
- **St. James's Place Wealth Management Group**, *Head of Digital Experience*

- **St. James's Place Wealth Management Group**, *Product Owner – Digital Proposition & Engagement*
- **Tilney Group**, *Chief Transformation Officer*
- **Tyndall Investment Management**, *Chief Operating Officer*
- **Waverton Investment Management Ltd**, *Chief Operating Officer*
- **Waverton Investment Management Ltd**, *Chief Technology Officer*
- **Whitefoord LLP**, *Partner, Chief Operating Officer*

BANK & BRANDS DISTRIBUTING FINANCIAL SERVICES

- **Market Harborough Building Society**, *Head of Mortgages*

SPEAKERS

- **Bridgeweave Ltd**, *Chief Commercial Officer*

SPONSORS & EXPERTS

- **Moneyinfo Ltd**, *Business Development Director*
- **Orbium**, *Associate Director*
- **Orbium**, *Managing Director*
- **Ortec Finance**, *Managing Director Business Development*
- **We are you**, *Marketing Manager*
- **Wealth Dynamix**, *Head of Marketing*
- **Wealth Dynamix**, *MD – UK and Americas*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Bridgeweave Ltd**, *Legal & Compliance Director*
- **EY**, *Senior FinTech Manager*
- **The Wealth Mosaic**, *Co Founder - Head of Strategy & Sales*
- **The Wealth Mosaic**, *Co-founder - Head of Marketplace & Content*
- **The Wealth Mosaic**, *Freelance Videographer/Photographer*