

Participant List

- **2 Plan Wealth Management**, *Head of Technology*
- **ARRT Integration**, *Integration Director*
- **Artorius Wealth**, *Applications and Systems Manager*
- **Artorius Wealth**, *CEO*
- **Artorius Wealth**, *IT Manager*
- **Atomos**, *Business Management Director*
- **Atomos**, *Managing Director - Portfolio Management*
- **Atomos**, *Proposition Director*
- **BBVA Mexico**, *Investment Counselor*
- **Brooks Macdonald Asset Management**, *Chief Technology Officer*
- **Brown Advisory**, *Head of International Private Client Operations*
- **Burlington Associates**, *Managing Director*
- **Cadro**, *Head of Operations*
- **Charles Stanley**, *Product Manager*
- **Clifton Asset Management**, *Head of Client Experience and Communications*
- **Close Brothers Asset Management**, *Chief Digital Officer*
- **Crowe Financial Planning UK**, *Operations Director*
- **Fidelius**, *Chief Executive Officer*
- **Finli Group**, *Chief Operating Officer*
- **Fintel**, *Head of Investment Management Compliance SimplyBiz DFM*
- **Goalkeep**, *Managing Director*
- **HFMC Wealth Management**, *Chief Operating Officer*
- **HSBC Private Bank (UK)**, *Head of Investment Strategy UK*
- **Hargreaves Lansdown Asset Management**, *Head of Advisory Product*
- **Holden & Partners**, *Director of Operations*
- **Hurst Point Group**, *Chief Technology & Transformation Officer*
- **Irwin Mitchell**, *Chief Operating Officer*
- **Irwin Mitchell**, *Head of Operations & Change*

- **J. Stern & Co**, *Client Director*
- **James Hambro & Partners**, *Chief Operating Officer*
- **James Hambro & Partners**, *Partner*
- **Kingswood**, *Project Analyst*
- **Lockhart Capital Management**, *Head of Client Advice*
- **Loyal North**, *Acquisitions Director*
- **Lynas Vokes Investments**, *Managing Director*
- **M&G Wealth**, *Proposition Manager*
- **MKC Wealth**, *Chief Technology Officer*
- **Mazars Financial Planning**, *Partner*
- **Mazars Financial Planning**, *Technology Manager*
- **Openwork**, *Chief Technology Officer*
- **Openwork**, *Commercial Director*
- **Parafinity**, *Chief Operations Officer*
- **Parmenion Capital Partners**, *Chief Commercial Officer*
- **Parmenion Capital Partners**, *Head of Product (Data and Services)*
- **Pembroke Financial Services**, *Head of Advice Proposition*
- **Perspective Financial Group**, *Chief Operating Officer*
- **RBC (Royal Bank of Canada) Wealth Management International**, *Chief Operating Officer*
- **Radiant Financial Planning**, *Head of Operations*
- **Rothschild & Co**, *Head of Investment Solutions and Client Support*
- **Saltus Partners**, *Chief Technology Officer*
- **Sesame Bankhall Group**, *Chief Operating Officer*
- **Sesame Bankhall Group**, *Distribution Director*
- **Thomson Tyndall**, *Associate*
- **Wealth Wizards**, *Chief Strategy Officer*

FACILITATORS & SPEAKERS

- **JoyndUp Ltd**, *Director*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Woven Advice**, *Co-Founder*