

WEALTHTECH MATTERS

Sponsors



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Participant List

ADVISORY DISTRIBUTORS

- **Attivo Group**, *Chief Technology Officer*
- **Beaufort Group**, *Chief Operating Officer*
- **Brewin Dolphin Ltd**, *Head of Digital Channels*
- **Dolfin**, *Chief Marketing Officer*
- **Hargreaves Lansdown Group**, *Head of Advisory Operations*
- **Hargreaves Lansdown Group**, *Head of Workplace Strategic Development*
- **P1 Investment Management**, *Head of Business Development*
- **Sandringham Financial Partners**, *Chief Technology Officer*
- **Saunderson House**, *Chief Operating Officer*
- **Saunderson House**, *Head of Information Technology*
- **Silverback Consultancy**, *Founder*
- **Tenet Group**, *Group Operations Director*
- **The Fry Group**, *Chief Technology Officer*
- **The Private Office**, *Head of Innovation*
- **Tilney Group**, *Head of Software Engineering*
- **Validpath Ltd**, *Network Development Director*

PRIVATE BANKERS & WEALTH MANAGERS

- **Aberdeen Standard Capital (ASC)**, *Head of Operations, Technology & Change*
- **Aberdeen Standard Capital (ASC)**, *Head of Operations*
- **Bank J. Safra Sarasin (Gibraltar) Ltd**, *Change Manager*
- **Bank J. Safra Sarasin (Gibraltar) Ltd**, *Chief Operating Officer*

- **Bordier & Cie**, *Head of Operations*
- **Capital Generation Partners LLP**, *Chief Operating Officer*
- **Coutts & Co - Natwest Umbrella**, *Chief Operating Officer*
- **Coutts & Co - Natwest Umbrella**, *Head of Front Office Transformation*
- **EFG Private Bank Ltd**, *Chief Operating Officer*
- **Holden & Partners LLP**, *Operations Director*
- **JM Finn & Co Ltd**, *Head of Wealth Planning*
- **Killik & Co**, *Head of Operations*
- **Killik & Co**, *Partner, Chief Operating Officer*
- **London & Capital**, *Chief Operating Officer*
- **London & Capital**, *Partner & Chief Executive Officer*
- **MASECO Private Wealth**, *Partner, Chief Operating Officer*
- **Redmayne-Bentley LLP**, *Head of Operations*
- **Rothschild & Co**, *Chief Operating Officer, Wealth*
- **Ruffer LLP**, *Chief Technology Officer*
- **SG Kleinwort Hambros Bank Ltd**, *Group Chief Operating Officer*
- **Saltus Partners LLP**, *Chief Operating Officer*
- **SandAire Ltd**, *Chief Operating Officer*
- **Schroders Personal Wealth**, *Advice Strategy Manager*
- **Signia Wealth Ltd**, *Chief Operating Officer and Finance Director*
- **St. James's Place Wealth Management Group**, *Digital Proposition Director*
- **Stonehage Fleming Group**, *Chief Operating Officer*
- **Tideway Investment Partners LLP - acquired by Sanlam**, *Chief Operating Officer*
- **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*
- **Tarabut Gateway**, *Chief Commercial Officer*

SPONSORS & EXPERTS

- **Orbium**, *Head of Strategy and Change*
- **Orbium**, *Managing Director*

- **Ortec Finance**, *Managing Director Business Development*
- **We are you**, *Managing Partner*
- **We are you**, *Marketing Manager*
- **Wealth Dynamix**, *MD – UK and Americas*