

WealthTech Matters - The Adviser 2023 Wednesday 28 June 2023, The Royal College of Physicians, 11 St Andrews PI, London NW1 4LE

Sponsors















Participant List

- 2 Plan Wealth Management Limited, IT Director
- 2 Plan Wealth Management Limited, IT Service Delivery Manager
- Abrdn, Chief Operating Officer, Adviser
- Abrdn, Head of Adviser Architecture & Technology
- Alpha FMC, Associate Director, Wealth Management Switzerland
- Alpha FMC, Director, Head Wealth Management Switzerland
- Alpha FMC, Director, Wealth Management UK
- Aria Forum Wealth Management, IT Manager
- Artorius Wealth Ltd, Applications and Systems Manager
- Artorius Wealth Ltd, IT Manager
- Atomos (previously Sanlam Wealth), Chief Operating Officer
- Attivo Group, Chief Operating Officer
- Beaufort Financial Reading, Director
- Brewin Dolphin Limited, Strategy Execution Director
- CMS Financial Management Limited, Chief Executive Officer
- Charles Stanley Plc, Head of Digital
- Clifton Asset Management PLC, Director
- Equilibrium Financial Planning LLP, Technology Manager
- Evelyn Partners, Chief Transformation Officer
- Finovation Consulting, Operations Director
- Fintel, Head of Investment Management Compliance Fintel; Head of Signature

- Hargreaves Lansdown Asset Management Limited, Head of Advisory Product
- Holden & Partners LLP, Director of Operations
- Independent, Operations Manager
- Investment Quorum Ltd, Marketing Manager
- Investment Quorum Ltd, Operations and Technology Manager
- JM Finn & Co Ltd, Chief Operating Officer
- James Hambro & Partners LLP, Chief Operations Officer Investments
- Killik & Co, Head of Digital Delivery
- Liberate Wealth, Head of Operations & Integration
- M&G Wealth Advice, Head of Proposition
- Mazars Financial Planning Limited, Chief Investment Officer
- Openwork Limited, Chief Technology Officer
- Openwork Limited, Commercial Development Director
- Origen Financial Services, Director, Proposition and Marketing
- Origen Financial Services, Proposition Manager
- Parmenion Capital Partners LLP, Chief Operating Officer
- Progeny Wealth Limited, Chief Technology Officer
- Redmayne-Bentley LLP, Director of IT
- Sarasin & Partners LLP, Business Manager
- Saunderson House Limited, Head of Information Technology
- Shard Capital, Chief Operating Officer
- Stellar Asset Management Limited, Chief Operating Officer
- Tenet Financial Solutions, IT & Change Director
- The Fry Group, Global Operations Director
- Threesixty services LLP, Chief Executive Officer
- Valentia Partners, Senior Manager
- VouchedFor, Managing Director
- Wealth Wizards, Financial Planning Consultant
- Westpac Banking Corporation, Senior Manager, Risk & Compliance

SPONSORS & EXPERTS

- · Additiv, Head of EMEA
- Additiv, UK Lead
- IPipeline UK, Sales Lead, Client Distribution
- IPipeline UK, Senior Sales Manager, Client Distribution
- InvestCloud Inc, Head of Strategy, InvestCloud Europe and Asia
- InvestCloud Inc. Sales Executive

- Moneyinfo Ltd, Business Development Director
- Moneyinfo Ltd, Managing Director
- SS&C Blue Prism, Sales Director
- SS&C Blue Prism, Senior Solution Consultant
- Saxo Markets, CEO UK
- Saxo Markets, Global head of preferred broker
- Saxo Markets, Head of Institutional Sales
- Unblu, CEO
- Unblu, Director of UK Marketing
- Unblu, Partner Manager
- Unblu, Sales Executive

FACILITATORS & SPEAKERS

- Acaria Coaching & Consulting, Founder & Director
- Deceased, Director
- FoxRed Insight, Director
- Independent Consultant, Supporting Innovative Technology Businesses
- Owen James Events, Managing Director
- Sionic, Director
- The Wealth Mosaic, Co-founder Head of Marketplace & Content

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- Bridgeweave Ltd, Chief Executive Officer
- Neon Century, Business Development Associate
- Neon Century, Managing Director