

WEALTHTECH MATTERS

WealthTech Matters - The Business 4

Thursday 9 November 2023, SEI Investments Offices, 14-18 Finsbury Square, London EC2A 1BR

Sponsors



Participant List

- **2 Plan Wealth Management Limited**, *IT Director*
- **2 Plan Wealth Management Limited**, *IT Service Delivery Manager*
- **Abrdn**, *Head of Adviser Architecture & Technology*
- **Abrdn**, *Senior Business Architect*
- **Artorius Wealth Ltd**, *Applications and Systems Manager*
- **Artorius Wealth Ltd**, *IT Manager*
- **Attivo Group**, *Chief Operating Officer*
- **Aviva**, *Head of Client Proposition (SFM and SEBS)*
- **BBVA Mexico (subsidiary of BBVA Group)**, *Investment Counselor*
- **Beaufort Financial Reading**, *Director*
- **Brewin Dolphin Limited**, *Head of Digital Channels*
- **Brewin Dolphin Limited**, *Strategy Execution Director*
- **Cazenove Capital Management Ltd**, *Chief Operating Officer*
- **Change Squared Ltd**, *Director of Progress*
- **Charles Stanley Plc**, *Head of Digital*
- **Clifton Asset Management PLC**, *Director*
- **Close Brothers Asset Management**, *Chief Digital Officer*
- **Close Brothers Asset Management**, *Chief Operating Officer*

This list is copyright of the Owen James Group and its contents must be kept confidential and may not be passed to any third party for any purpose

- **Crowe Financial Planning UK Limited**, *Operations Director*
- **Deutsche Bank Wealth Management**, *COO - International Private Bank UK Platform*
- **Fintel**, *Head of Investment Management Compliance Fintel; Head of Signature*
- **Fintel**, *Managing Director*
- **HFMC Wealth Management Ltd**, *Chief Operating Officer*
- **Handelsbanken Asset Management**, *Chief Operating Officer*
- **Hargreaves Lansdown Asset Management Limited**, *Head of Advisory Product*
- **Holden & Partners LLP**, *Director of Operations*
- **Independent**, *Head of Workplace Advice*
- **Independent**, *Operations Manager*
- **Investec Wealth & Investment (UK)**, *Head of Digital Marketing & Marketing Technology*
- **Investment Quorum Ltd**, *Wealth Manager*
- **J.P. Morgan Private Bank**, *Chief Operating Officer*
- **JP Morgan Asset Management**, *Chief Executive Officer*
- **James Hambro & Partners LLP**, *Chief Operations Officer*
- **James Hambro & Partners LLP**, *Partner*
- **Julius Baer International Ltd**, *Senior Project Manager*
- **Killik & Co**, *Head of Digital Delivery*
- **Kingswood**, *Chief Operating Officer*
- **London and Capital Wealth Advisers Limited**, *Head of Change*
- **MWA Financial**, *Director & Head of Operations*
- **Mazars Financial Planning Limited**, *Chief Investment Officer*
- **Openwork Limited**, *Chief Technology Officer*
- **Origen Financial Services**, *Head of Operations*
- **P1 Investment Management**, *Head of Business Development*
- **Parker Financial Advice Limited**, *Principal*
- **Parmenion Capital Partners LLP**, *Chief Operating Officer*
- **Progeny Wealth Limited**, *Chief Technology Officer*
- **Quintet**, *Head of Digital*
- **RBS**, *Managing Director, Investing Journeys – Wealth Businesses*
- **Rathbones Group Plc**, *Chief Operating Officer*
- **Rathbones Group Plc**, *Director, Client Strategy & Insight*
- **Sarasin & Partners LLP**, *Business Manager*
- **Saunderson House Limited**, *Head of Information Technology*
- **Schroders Plc**, *Head of Operations Innovation*
- **Sesame Bankhall Group**, *Head of Data and Digital Innovation*
- **Shard Capital**, *Chief Operating Officer*

- **Stellar Asset Management Limited**, *Chief Operating Officer*
- **Tavistock Private Client Limited**, *Group Corporate Development Director*
- **Tenet Group**, *CEO*
- **Tideway Investment Partners LLP**, *Chief Operating Officer*
- **Waverton Investment Management Limited**, *Chief Operating Officer*
- **Wealth Wizards**, *Chief Strategy Officer*

SPONSORS & EXPERTS

- **Affinity**, *Co-founder*
- **Dorsum Ltd**, *Head of Product - Wealth Portal*
- **Dorsum Ltd**, *International Sales Director*
- **FA Solutions UK**, *Business Development Director*
- **FA Solutions UK**, *Managing Director UK*
- **InvestCloud Inc**, *Head of Strategy, InvestCloud Europe and Asia*
- **InvestCloud Inc**, *Sales Director, UK & Europe*
- **Maveric NXT Limited**, *Vice President*
- **Ortec Finance**, *Managing Director of Business Development Goal Based Planning*
- **SEI**, *Business Development Director*
- **SEI**, *Product Solutions Manager*
- **Seccl Technology Limited**, *Chief Executive Officer*
- **Seccl Technology Limited**, *Head of Growth*

FACILITATORS & SPEAKERS

- **Keynote**, *Author, speaker, coach and expert in organisational culture change*
- **Alpha FMC**, *Wealth Management & Client Insight industry expert*
- **Sionic**, *Director*
- **The Wealth Mosaic**, *Co-founder - Head of Marketplace & Content*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Finovation Consulting**, *Director*
- **FoxRed Insight**, *Director*