

WEALTHTECH MATTERS

WealthTech Matters The Client 2024

Thursday 7 March 2024, SEI Investments, 14-18 Finsbury Square, London EC2A 1BR

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- **2 Plan Wealth Management Limited**, *IT Service Delivery Manager*
- **Alternative Business Funding Ltd**, *CEO/COO*
- **Artorius Wealth Ltd**, *Applications and Systems Manager*
- **Artorius Wealth Ltd**, *CEO*
- **Artorius Wealth Ltd**, *IT Manager*
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- **Crowe Financial Planning UK Limited**, *Operations Director*
- **Emery Little Wealth Management Limited**, *Head of Operations*
- **Fidelity International**, *Chief Operating Officer*
- **Finovation Consulting**, *Director*

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- **HSBC Bank Plc**, *Senior Customer Journey Lead - Build Investments & Financial Planning*
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- **Independent**, *Operations Manager*
- **Investment Quorum Ltd**, *Head of Technology*
- **Investment Quorum Ltd**, *Operations and Technology Manager*
- **James Hambro & Partners LLP**, *Chief Operating Officer*
- **Killik & Co**, *Chief Technology Officer*
- **London and Capital Wealth Advisers Limited**, *Head of Change*
- **M&G Wealth**, *Head of Proposition*
- **M&G Wealth**, *Proposition Manager*
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- **Mazars Financial Planning Limited**, *Chief Investment Officer*
- **One Four Nine Group**, *Chief Operating Officer*
- **Openwork Limited**, *Chief Technology Officer*
- **Openwork Limited**, *Commercial Development Director*
- **P1 Investment Management**, *Head of Business Development*
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- **Parmenion Capital Partners LLP**, *Chief Operating Officer*
- **Progeny Wealth Limited**, *Chief Technology Officer*
- **RBS**, *Managing Director, Investing Journeys, Customer & Growth – Asset Management*
- **Ruffer LLP**, *Chief Technology Officer*
- **SG Kleinwort Hambros Bank Limited**, *Chief Information Technology Officer*
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- **Trustestate**, *Founder & CEO*
- **Unbiased.co.uk**, *Chief Revenue Officer*
- **VouchedFor (Acquired by Fintel)**, *Chief Operating Officer*
- **Wealth Wizards**, *Chief Strategy Officer*
- **Whitman Asset Management**, *Operations Lead, Finance & Business Development*

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- **Atfinity**, *Specialist Onboarding, KYC & CLM*
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- **Dynamic Planner**, *Enterprise Development Director*
- **Dynamic Planner**, *Head of Large Business Development*
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- **ERI Banking Software Ltd**, *Sales Manager*
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- **FA Solutions UK**, *Global Head of Sales Engineering*
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- **Financial Software Ltd**, *Client Reporting Consultant*
- **Financial Software Ltd**, *Managing Director*
- **Financial Software Ltd**, *Sales Manager*
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- **SEI**, *Chief Operating Officer*
- **SS&C Blue Prism**, *Head of Wealth and Asset Management Solutions*
- **SS&C Blue Prism**, *Sales Director*
- **Seccl Technology Limited**, *Head of Growth*
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FACILITATORS & SPEAKERS

- **Alpha FMC**, *Wealth Management & Client Insight industry expert*
- **Davies Group (was Sionic)**, *Director*
- **FoxRed Insight**, *Director*
- **JoyndUp Ltd**, *Director*
- **Owen James Events**, *Managing Director*
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