

Sponsors



Asset
Management



J.P.Morgan
Asset Management



Participant List

BUSINESS STRATEGY

- **Argentis Financial Management**, *Executive Chairman*
- **Attivo Group**, *Financial Planning Director & Chartered Financial Planner*
- **Aviva**, *Head of Advice*
- **Beaufort Group**, *Group Chairman*
- **Brewin Dolphin Ltd**, *Head of Regulated Advice & Performance*
- **Compliance First Ltd**, *Managing Director*
- **Continuum (FS) LLP**, *Managing Partner*
- **EQ Investors**, *Executive Director*
- **Foster Denovo**, *CEO*
- **Helm Godfrey Partners Ltd**, *Managing Director and CEO*
- **LEBC Group**, *CEO*
- **LEBC Group**, *Special Adviser to the Director of Public Policy*
- **Lighthouse Group Plc**, *Chief Executive Officer*
- **Loyal North**, *Business Development Director*
- **Magus Financial Management**, *Chairman*
- **Magus Private Wealth Ltd**, *Chief Executive*
- **New Leaf Distribution**, *Chief Executive Officer*
- **New Leaf Distribution**, *Managing Director*
- **Old Mutual Wealth**, *Retail Client Solutions Director*
- **Paradigm Norton**, *Chief Executive Officer*

- **Personal Touch Financial Services**, *CEO*
- **Pi Financial Ltd**, *CEO*
- **RSMR**, *Managing Director*
- **Sandringham Financial Partners**, *CEO*
- **SimplyBiz Plc**, *Joint CEO*
- **Smith & Williamson**, *Director and Head of Financial Planning*
- **St. James's Place Wealth Management Group**, *Head of Establishment, Regulatory*
- **Succession Group Ltd.**, *Managing Director*
- **Tavistock Investments Plc**, *Group Operations Director*
- **Tavistock Partners Ltd**, *Group Business Development Director*
- **Tavistock Private Client**, *Managing Director*
- **Tenet Group**, *CEO*
- **Tenet Group**, *Group Operations Director*
- **The Fry Group**, *Chairman and Managing Director*
- **The Private Office**, *CEO & Partner*
- **The Private Office**, *Senior Partner*
- **Thomas Miller Investment Ltd**, *Managing Director*
- **Unique Financial Planning**, *Business Development Director*
- **Whitechurch Securities Ltd**, *Financial Planning Director*
- **Willis Owen**, *Managing Director*

SPONSORS & EXPERTS

- **Carmignac**, *Business Development Director*
- **Carmignac**, *Head of U.K. Retail*
- **Dimensional Fund Advisors Ltd**, *Regional Director*
- **Dimensional Fund Advisors Ltd**, *Vice President*
- **Experian**, *Director of Insurance, Wealth, Life & Pensions, UK & Ireland*
- **FundsNetwork**, *Associate Director - Key Accounts*
- **FundsNetwork**, *Heads of FundsNetwork and Platform Services*
- **Goldman Sachs Asset Management International**, *Executive Director*
- **Goldman Sachs Asset Management International**, *Executive Director*
- **Intelliflo**, *CEO*
- **Intelliflo**, *Client Solutions Manager*
- **Intelliflo**, *Marketing Executive*
- **Intelliflo**, *Regional Sales Manager - North*
- **J.P. Morgan Asset Management**, *International ETF Marketing Manager*

- **Russell Investments**, *Investment Specialist*

FACILITATORS & SPEAKERS

- **Capgemini Consulting, Financial Services**, *Principal - Wealth, Long Term Savings & Insurance*
- **Owen James Group**, *Consultant*
- **Rennison Consulting Ltd**, *Director*
- **Silverback Consulting**, *Founder*
- **Venture Development Solutions Ltd**, *Director*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Independent Financial Consultant**, *Global Head of Industry Policy Liaison*
- **PIMFA**, *Chief Executive*