

## Sponsors



## Participant List

### BUSINESS STRATEGY

- **2plan Wealth Management**, *CEO*
- **Aim Independent Ltd**, *Managing Director*
- **Alexander House Financial Services Ltd.**, *Managing Director*
- **Argentis Financial Management**, *Executive Chairman*
- **Attivo Group**, *Financial Planning Director & Chartered Financial Planner*
- **Aviva**, *Head of Advice*
- **Beaufort Group**, *Group Chairman*
- **Between Jobs**, *Business Development Director*
- **Compliance First Ltd**, *Managing Director*
- **Connor Broadley Ltd**, *CEO & Co-Founder*
- **Continuum (FS) LLP**, *Managing Partner*
- **Defaqto Ltd.**, *CEO*
- **Defaqto Ltd.**, *Head of Insight and Consulting-Wealth and Protection*
- **EQ Investors**, *Executive Director*
- **EQ Investors**, *Senior Director*
- **Foster Denovo**, *CEO*
- **Handelsbanken Wealth Management**, *Head of Advice*

- **Heartwood Wealth Management**, *Head of Investment Product*
- **Helm Godfrey Partners Ltd**, *Managing Director and CEO*
- **LEBC Group**, *Group Development Director*
- **LEBC Group**, *Special Adviser to the Director of Public Policy*
- **Lighthouse Group Plc**, *Chief Executive Officer*
- **Magus Private Wealth Ltd**, *Chief Executive*
- **Mazars LLP**, *Partner - Entrepreneurial Business & Private Client*
- **New Leaf Distribution**, *Chief Executive Officer*
- **New Leaf Distribution**, *Managing Director*
- **Nutmeg Savings and Investments**, *Head of Financial Advice*
- **Paradigm Norton**, *Chief Executive Officer*
- **Personal Touch Financial Services**, *Chief Risk officer*
- **Pi Financial Ltd**, *CEO*
- **RSMR**, *Managing Director*
- **Saunderson House**, *Chief Executive Officer*
- **Sesame Bankhall Group**, *Executive Chairman*
- **Smith & Williamson**, *Director and Head of Financial Planning*
- **Square Mile Investment Consulting and Research Limited**, *Business Development Director*
- **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 Private Office**, *CEO*
- **The Private Office**, *Senior Partner*
- **Thomas Miller Investment Ltd**, *Managing Director*
- **Threesixty services LLP**, *Managing Director*
- **Unique Financial Planning**, *Business Development Director*
- **Willis Owen**, *Managing Director*

## INVESTMENT

- **Magus Financial Management Limited**, *Chief Investment Officer*

## SPONSORS & EXPERTS

- **BMO Global Asset Management**, *Director, Head of Distribution Partners, Retail, UK*
- **BMO Global Asset Management**, *Director, Head of Distribution, UK Wholesale*
- **Carmignac**, *Business Development Director*
- **Carmignac**, *Head of U.K. Retail*
- **Copia Capital Management**, *CIO - Copia Capital Management*
- **Dimensional Fund Advisors Ltd**, *Regional Director*
- **Dimensional Fund Advisors Ltd**, *Vice President*
- **Experian**, *Business Development Manager, Identity and Fraud*
- **Experian**, *Client Director*
- **Experian**, *Director of Insurance, Wealth, Life & Pensions, UK & Ireland*
- **FundsNetwork**, *Head of FundsNetwork Proposition*
- **FundsNetwork**, *Head of Strategic Account Sales*
- **Goldman Sachs Asset Management International**, *Executive Director*
- **Goldman Sachs Asset Management International**, *Executive Director*
- **Goldman Sachs Asset Management International**, *Head of International Portfolio Strategy*
- **Intelliflo**, *Client Solutions Manager*
- **Intelliflo**, *Regional Sales Manager - North*
- **J.P. Morgan Asset Management**, *Executive Director, Head of ETF Distribution - Netherlands, Nordic Countries & UK*
- **J.P. Morgan Asset Management**, *UK ETF Sales Executive Beta Strategies*
- **Novia Financial plc**, *Head of Distribution*
- **Russell Investments**, *Head of UK Advisory & Intermediary Services*
- **Russell Investments**, *Regional Director*

## **FACILITATORS & SPEAKERS**

- **Capgemini Consulting, Financial Services**, *Principal - Wealth, Long Term Savings & Insurance*
- **Consultant**, *Generations Expert, Historian of Contemporary Values*
- **Foot Anstey LLP**, *Partner*
- **Independent Consultant**, *Consultant*
- **JoyndUp Ltd**, *Director*
- **Matthew J Goodwin**, *?Professor of Politics*
- **Octo Members Group**, *Managing Director and Founder*
- **Owen James Group**, *Consultant*
- **Oxford Risk**, *Head of Behavioural Finance*
- **PwC**, *Director*
- **PwC**, *Senior Manager, AWM Digital*

- **PwC**
- **Rennison Consulting Ltd**, *Director*
- **Richard Parkin Consulting**, *Managing Director*
- **Silverback Consulting**, *Founder*
- **Soprano Consulting**, *Managing Director*

## **INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS**

- **FundsNetwork**, *Head of FundsNetwork*
- **Independent Consultant**, *Retail Client Solutions Director*
- **Independent Financial Consultant**, *Global Head of Industry Policy Liaison*
- **PIMFA**, *Chief Executive Officer*