

A Meeting of Minds - Wealth Management and Private Banking
Thursday 16 November 2017, The Lanesborough Hotel, Hyde Park Corner, London, SW1X 7TA

Strategic Partners



Sponsors



Participant List

BUSINESS STRATEGY

- **ABN AMRO (Guernsey) Ltd**, *Managing Director & Deputy Chief Executive Officer*
- **AIB Private Banking**, *Head of Lending*
- **Affinity Private Wealth**, *Managing Director*
- **BRI Wealth Management Plc**, *Chairman and Chief Executive*
- **Barclays Wealth & Investment Management UK**, *Head of Business Transformation*
- **Brewin Dolphin Ltd**, *Head of Propositions*
- **Brewin Dolphin Ltd**, *Managing Director of Investment Solutions & Distribution*
- **City Asset Management Plc**, *Chief Executive Officer*
- **Credo Group UK Ltd**, *Chief Executive Officer*
- **EFG Private Bank Ltd**, *Chief Financial Officer & Deputy Chief Executive Officer*
- **EFG Private Bank Ltd**, *Head of Private Banking*
- **EQ Investors**, *Chief Executive Officer*
- **EQ Investors**, *Executive Director*

- **Falcon Private Wealth Ltd**, *Managing Director, Chief Executive Officer*
- **Goldman Sachs**, *Chief Supervisory Officer*
- **HSBC Bank Plc**, *Head of Premier and Wealth Distribution*
- **Hawksmoor Investment Management Ltd**, *Chief Executive Officer*
- **Heartwood Wealth Management**, *Chief Executive Officer*
- **Intesa Sanpaolo Private Banking**, *General Manager*
- **J.P. Morgan Private Bank**, *Associate General Counsel*
- **Jefferies**, *Chief Operative Officer and Head of European Wealth Management*
- **Julius Baer International Ltd**, *Managing Director, Head of Front Office UK & Ireland*
- **LGT Vestra LLP**, *Business Strategist*
- **Lockhart Capital Management LLP**, *Chief Executive Officer & Founding Partner*
- **London & Capital**, *Chief Operating Officer*
- **Pictet & Cie (Europe) SA**, *Chief Operating Officer*
- **Pictet & Cie (Europe) SA**, *Equity Partner, Group Managing Director*
- **Rothschild Private Bank**, *Chief of Staff*
- **SEB**, *Head of Private Banking UK*
- **SG Kleinwort Hambros Bank Ltd**, *Director and Group Secretary General*
- **SG Kleinwort Hambros Bank Ltd**, *Head of Private Banking*
- **SandAire Ltd**, *Chief Operating Officer*
- **Santander UK Plc**, *Managing Director, Cater Allen*
- **Saranac Partners Ltd**, *Executive Director*
- **Scalable Capital**, *Founder & Chief Executive Officer*
- **Scalable Capital**, *UK Co-Founder & Chief Operating Officer*
- **Smith & Williamson**, *Partner, Family Office Services*
- **Standard Life Wealth**, *Chief Executive Officer*
- **Tcam Asset Management**, *Joint Chief Executive Officer*
- **UBS Wealth Management UK**, *Head of UK Domestic*
- **Weatherbys Private Banking Ltd**, *Head of Private Banking*

INVESTMENT

- **Arbuthnot Latham & Co Ltd**, *Head of Investment Management*
- **Barclays Wealth & Investment Management UK**, *Chief Investment Officer*
- **Brewin Dolphin Ltd**, *Investment Director*
- **Charles Stanley Plc**, *Chief Investment Officer*
- **Deutsche Bank Wealth Management**, *Managing Director, Head of Global Investment Group*
- **Lockhart Capital Management LLP**, *Chief Investment Officer and Founding Partner*

- **Lombard Odier Investment Managers**, *Chief Investment Strategist*
- **Maseco Private Wealth**, *Partner*
- **Quartet Investment Manager**, *Managing Partner*
- **RBC Wealth Management International**, *Head of Investments - British Isles*
- **Rothschild Private Bank**, *Managing Director, Global Investment Strategist*
- **SandAire Ltd**, *Chief Investment Officer*
- **Tilney**, *Investment Director*
- **Tyndall Investment Management**, *Director*
- **UBS Wealth Management UK**, *Head of Investment Products & Services, UK & Jersey*
- **Walker Crips Group Plc**, *Chief Investment Officer*
- **Wellian Investment Solutions**, *Chief Investment Officer*
- **Wren Investment Office Ltd**, *Client Relationship Director*

STRATEGIC PARTNERS & EXPERTS

- **Architas Multi Manager**, *Head of Intermediary Distribution*
- **Architas Multi Manager**, *Investment Development Manager*
- **BlackRock iShares**, *Head of UK Wealth, iShares EMEA*
- **BlackRock iShares**, *Vice President, Wealth Management Sales UK*
- **EY**, *Director, Wealth and Asset Management*
- **EY**, *Partner, UK Wealth Management Lead*
- **PIMCO Europe Ltd**, *Product Manager, EMEA*
- **PIMCO Europe Ltd**, *Senior Vice President - Global Wealth Management, EMEA*

SPONSORS & EXPERTS

- **Avaloq UK**, *Business Development Manager*
- **Backbase**, *Account Executive*
- **Backbase**, *Innovation Leader*
- **Farrer & Co**, *Partner*
- **Farrer & Co**, *Partner*
- **Farrer & Co**, *Partner*
- **Lazard Asset Management**, *Managing Director, Third Party Distribution*
- **Liontrust**, *Head of Sustainable Fund Sales*
- **Liontrust**, *Head of Sustainable Investment*
- **Mirae Asset Global Investments (UK)**, *Head of UK & North American Offshore Sales*
- **Multrees**, *Chief Executive Officer*
- **Multrees**, *Client Solutions Manager*

- **Schroders Plc**, *Head of Asset Manager Sales*
- **Schroders Plc**
- **Utmost Wealth Solutions**, *Chief Executive Officer*
- **Utmost Wealth Solutions**, *Technical Sales Manager*
- **Vanguard**, *Head of Wealth*
- **Vanguard**, *Principal and Director of the Center for Investor Research*
- **Vanguard**, *Senior Institutional Sales Executive (Sales & Marketing)*
- **WEALINS S.A.**, *Marketing Consultant UK*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Coombe Advisors Ltd**, *Managing Director*
- **FINTech Circle Innovate (London)**, *Commercial Director*
- **Financial Conduct Authority**, *Technical Specialist, Investment Management*
- **FundsNetwork**, *Associate Director, FundsNetwork Key Accounts*
- **HSBC Bank Plc**, *Chief Operating Officer, Corporate and Institutional Digital*
- **HSBC Bank Plc**, *Head of Digital Assets IT*
- **Personal Investment Management and Financial Advice Association (PIMFA)**, *Chief Executive*
- **The C & D Partnership**, *Managing Partner*