

A Meeting of Minds: Wealth Management and Private Banking

Thursday 16 June 2016 – The Berkeley Hotel, Knightsbridge, London SW1X 7RL

Participant List

BUSINESS STRATEGY

- **ABN AMRO (Guernsey) Ltd** - Managing Director & Deputy Chief Executive Officer
- **Affinity Private Wealth** - Managing Director
- **Bordier & Cie** - Chief Executive Officer
- **Boston Limited** - Chief Executive Officer
- **Brown Advisory** - Partner
- **C Hoare & Co** - Head of Front Office
- **C Hoare & Co** - Head of Wealth Management
- **Canaccord Genuity Wealth Management** - Chief Executive Officer
- **Cazenove Capital Management Ltd** - Deputy Head, UK Private Wealth Management
- **Charles Stanley Plc** - Director, Wealth Management
- **Close Brothers Asset Management** - Chief Executive Officer
- **Coombe Advisors Limited** - Managing Director
- **Coutts & Co** - Executive Director, Digital Solutions
- **Credo Group UK Ltd** - Chief Executive Officer
- **Deutsche Bank Wealth Management** - Managing Director, Global Business Risk Manager
- **Duncan Lawrie Private Banking** - Managing Director, Head of Fiduciary Services
- **EFG Private Bank Ltd** - Head of Private Banking
- **Farm Street Partners** - Partner, Head of Risk
- **Fleming Family & Partners** - Managing Director

Strategic Partners



Sponsors:



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- **Fry Family Office** - *Chief Executive Officer*
- **Fry Family Office** - *Director of Business Development*
- **Goldman Sachs** - *Chief Supervisory Officer*
- **HSBC Private Bank (UK) Ltd** - *Chief Operating Officer, Markets EMEA*
- **JM Finn & Co Ltd** - *Head of Risk and Strategic Analysis*
- **J.P. Morgan Private Bank** - *Associate General Counsel*
- **Julius Baer International Ltd** - *Chief Executive Officer*
- **London & Capital** - *Chief Operating Officer*
- **Mirabaud & Cie Private Bankers** - *Co-Head of Private Wealth Management*
- **Nordea Bank** - *Executive Director, International Private Banking*
- **Pebrand** - *Chief Executive Officer and Founder*
- **Pictet & Cie (Europe) SA** - *Chief Operating Officer*
- **Santander Wealth Management** - *Wealth Management Director & Managing Director - Cater Allen*
- **Sarasin & Partners LLP** - *Partner, Private Clients*
- **Savills** - *Director Family Office Services*
- **SEB** - *Head of Private Banking UK*
- **Scalable Capital** - *Founder & Managing Director*
- **Scalable Capital** - *Chief Marketing Officer & UK Co-Founder*
- **Turcan Connell** - *Joint Chief Executive Officer*
- **UBS Wealth Management UK** - *Head of UK Domestic*

INVESTMENT

- **Arbuthnot Latham & Co Ltd** - *Head of Investment Management*
- **Bank of Ireland Private Banking** - *Director, Investment*
- **Bentley Reid & Co (UK) Ltd** - *Investment Director*
- **Citi Private Bank** - *Head of Strategic Asset Allocation*
- **Coutts & Co** - *Managing Director Financial Advisory and Intermediary Solutions*
- **Coutts & Co** - *Head of FAIS Transformation Programme*

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- **Credo Group UK Ltd** - *Chief Investment Officer*
- **Deutsche Bank Wealth Management** - *Managing Director, Head of Global Investment Group*
- **EFG Private Bank Ltd** - *Chief Financial Officer & Deputy Chief Executive Officer*
- **Hawksmoor Investment Management** - *Senior Investment Manager*
- **HSBC Private Bank (UK) Ltd** - *Head of Private Bank Investment Group*
- **JM Finn & Co Ltd** - *Head of Investment Management*
- **Lincoln Private Investment Office** - *Chief Investment Officer*
- **London & Capital** - *Partner, Head of Private Investment Office*
- **Maseco Private Wealth** - *Managing Director, Head of Portfolio Strategy*
- **Quartet Investment Manager** - *Managing Partner, Investment Manager*
- **RBC Wealth Management International** - *Head of Investments*
- **Sanlam UK** - *Global Chief Investment Officer*
- **SG Hambros Private Banking** - *Global Chief Investment Officer*
- **Tilney Investment Management** - *Investment Director*
- **Tilney Investment Management** - *Investment Director*
- **Turcan Connell** - *Joint Chief Executive Officer & Chief Investment Officer*
- **UBS Wealth Management (UK)** - *Head of Investment Products & Services, UK & Jersey*
- **Walker Crips Group Plc** - *Chief Investment Officer*
- **Waverton Investment Management Ltd** - *Senior Analyst*

STRATEGIC PARTNER

- **Carmignac** - *Head of Discretionary*

SPONSORS

- **BlueBay Asset Management LLP** - *Sales Director - Europe*
- **Calamos International LLP** - *Managing Director EMEA*
- **Farrer & Co** - *Partner*
- **Farrer & Co** - *Partner*
- **INVESCO Perpetual** - *Sales Manager Banks and Strategic Distributors, UK*
- **INVESCO Perpetual** - *Sales Manager, London Wealth and Family Offices*

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- **IWI International Wealth Insurer S.A** - *Marketing Consultant UK*
- **IWI International Wealth Insurer S.A** - *Chief Executive Officer*
- **Lazard Asset Management** - *Director - Head of Third Party Distribution*
- **Multrees** - *Marketing Communications Manager*
- **PIMCO Europe Ltd** - *Senior Vice President - Global Wealth Management, EMEA*
- **Prudential International Assurance** - *Head of Product*
- **Sammedia Ltd** - *Business Development Director*

SPONSORS EXPERTS

- **BlackRock iShares** - *Co-Head of iShares EMEA Sales*
- **BlueBay Asset Management LLP** - *Partner, Co-Head of Investment Grade Debt, Senior Portfolio Manager*
- **Calamos International LLP** - *Senior Vice President*
- **Carmignac** - *Head of Retail*
- **INVESCO Perpetual** - *Head of Market Insights Team*
- **Lazard Asset Management** - *Research Analyst*
- **Multrees** - *Chief Executive Officer*
- **PIMCO Europe Ltd** - *Vice President - Global Wealth Management, UK*
- **Sammedia Ltd** - *Director*

FACILITATORS AND SPEAKERS

- **Heartwood Wealth Management** - *Executive Vice President*
- **Independent Consultant** - *Independent Consultant*
- **Scorpio Partnership** - *Executive Director*
- **Scorpio Partnership** - *Managing Partner*
- **Scorpio Partnership** - *Managing Partner*

INDUSTRY BODIES, ASSOCIATIONS AND GUEST

- **Financial Conduct Authority** - *Wealth Management Manager*
- **Financial Conduct Authority** - *Wealth Management Supervisor*

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