



A Meeting of Minds Wealth Management & Private Banking Thursday 14 June 2018, The Berkeley Hotel, Wilton Place, Knightsbridge, London SW1X 7RL

# **Strategic Partner**



## **Sponsors**









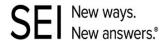


















# **Participant List**

## **BUSINESS STRATEGY**

- AIB Private Banking, Head of Lending
- Affinity Private Wealth, Chief Executive Officer
- Bank of Ireland, Director, Wealth Distribution
- Banque Internationale à Luxembourg SA, Global Head of Private Banking
- Barclays Wealth & Investment Management UK, Head of Business Transformation
- C Hoare & Co, Managing Director
- Coutts & Co, Executive Director, Head of Implementation (People & Culture)
- Emirates NBD, Head of Private Banking, London
- Falcon Private Wealth Ltd, Managing Director, Chief Executive Officer
- Goldman Sachs, Chief Supervisory Officer

- Hampden & Co, Chief Executive
- Intesa Sanpaolo Private Banking, General Manager
- J.P. Morgan Private Bank, Associate General Counsel
- LGT Vestra LLP, Business Strategist
- Lockhart Capital Management LLP, Chief Executive Officer & Founding Partner
- London & Capital, Partner, Chief Operating Officer
- Pictet & Cie (Europe) SA, Chief Operating Officer
- Quartet Investment Manager, Managing Partner
- RBC Wealth Management International, Managing Director and Head, Client & Business Strategy
- Rothschild Private Bank, Chief of Staff
- SG Kleinwort Hambros Bank Ltd. Executive Board Director and Secretary General
- Saranac Partners Ltd, Executive Director
- Sarasin & Partners LLP, Chief Operating Officer, Client Affairs
- Scalable Capital, UK Co-Founder & Chief Executive Officer
- Smith & Williamson, Partner, Family Office Services
- Tcam Asset Management, Joint Chief Executive Officer
- Thomas Miller Investment Ltd, Chief Executive Officer
- Weatherbys Private Banking Ltd, Head of Private Banking
- Wren Investment Office Ltd, Chief Executive Officer

#### INVESTMENT

- Arbuthnot Latham & Co Ltd, Managing Director, Investment Management
- Bank of Ireland, Director of Investment Markets
- Barclays Wealth & Investment Management UK, Business Manager Chief Investment Office
- Barclays Wealth & Investment Management UK, Chief Investment Officer
- Brewin Dolphin Ltd, Investment Director
- City Asset Management Plc, Investment Director
- Coutts & Co, Head of Discretionary and Advisory Portfolio Management
- Deutsche Bank Wealth Management, Managing Director, Head of Global Investment Group
- Hawksmoor Investment Management Ltd, Director, Senior Investment Manager
- JM Finn & Co Ltd, Head of Investment Management
- Lincoln Private Investment Office, Chief Investment Officer
- Lloyds Banking Group, Head of Portfolio Specialists, Wealth Investment Office
- Lockhart Capital Management LLP, Chief Investment Officer and Founding Partner
- London & Capital, Partner & Head of the Private Investment Office
- Maseco Private Wealth, Partner

- RBC Wealth Management International, Head of Investments, RBC Wealth Management International
- SandAire Ltd, Chief Investment Officer
- Tcam Asset Management, Joint Chief Executive Officer & Chief Investment Officer
- Tilney Group Ltd, Investment Director
- Tyndall Investment Management, Director
- UBS Wealth Management UK, Head of Investment Products & Services, UK & Jersey
- Walker Crips Group Plc, Chief Investment Officer
- Wren Investment Office Ltd, Client Relationship Director

#### STRATEGIC PARTNERS & EXPERTS

- EY, Director, Wealth and Asset Management
- EY, Manager, Wealth & Asset Management Advisory
- EY, Partner, UK Wealth Management Lead

## **SPONSORS & EXPERTS**

- AutoRek, Asset Management Leader
- AutoRek, CASS Business Analyst
- BlackRock iShares, BlackRock London Discretionary Wealth Sales
- BlackRock iShares, CFA, BlackRock London Discretionary Wealth Sales
- BlackRock iShares, Director, a member of the BlackRock Impact team in EMEA
- BlackRock iShares, IShares UK Wealth Sales
- BlackRock iShares, IShares UK Wealth Sales
- FactSet, Business Development, FactSet Digital Solutions
- FactSet, Director, Market Development, FactSet Digital Solutions
- Farrer & Co. Associate
- Farrer & Co. Partner
- Farrer & Co, Partner
- Farrer & Co, Partner
- Hermes Fund Managers Limited, Global Head of Business Development
- Hermes Fund Managers Limited, Head of UK Wholesale
- Iress, Business Lead Private Wealth
- Iress, Group Executive, Strategy
- Lazard Asset Management, Commodity Portfolio Manager
- Lazard Asset Management, Managing Director, Third Party Distribution
- Liontrust, Head of Sustainable Fund Sales

- Multrees, Chief Executive Officer
- Multrees, Client Solutions Manager
- SEI Wealth Platform, Business Development Director
- SEI Wealth Platform, Proposition Director
- SS&C Advent, Regional Sales Manager UK
- SS&C Advent, Solutions Consultant
- SS&C Advent
- UBS Asset Management Ltd, Executive Director, Head UBS ETF Sales UK
- UBS Asset Management Ltd, Sales Director Discretionary Sales Northern England, Scotland & Northern Ireland
- UBS Asset Management Ltd
- Vanguard, Business Development Manager
- Vanguard, Head of UK Distribution
- Vanguard, Investment Strategist
- Vanguard, Senior Institutional Sales Executive (Sales & Marketing)

#### **FACILITATORS & SPEAKERS**

- Accenture, UK Wealth and Asset Management
- Aite Group, Senior Analyst, Wealth Management
- David Goodhart, Author
- GDR Creative Intelligence, CEO
- KPMG, Partner, UK Investment Management
- Knadel, Wealth Management Practice Leader
- Paradox, Co-Founder
- Scorpio Partnership, Analyst
- Scorpio Partnership, Director
- Scorpio Partnership, European Head of Wealth Management
- Scorpio Partnership, Executive Director
- Scorpio Partnership, Senior Manager
- Scorpio Partnership, Senior Manager
- Scorpio Partnership

## INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- Financial Conduct Authority, Associate
- Google UK Ltd, Country Sales Director
- Owen James Group, Consultant

- PIMFA, Chief Executive
- Somers Partnership, Founder
- TISA, Global Head of Industry Policy Liaison
- The C & D Partnership, Managing Partner
- Wealth Mosaic, Co-founder Head of Marketplace & Content