

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*