

## WINNING ADVISERS

Tuesday 11 October 2016, Tylney Hall, Hook, Hampshire, RG27 9AZ

### Participant List

- **8AM Global LLP** - Partner
- **8AM Global LLP** - Partner
- **Advies Private Clients** - Partner
- **Advies Private Clients** -Partner
- **Allied Luptons Limited** – Managing Director
- **Aim Independent Ltd** - Managing Director
- **Aisa Professional** - Later Life Adviser
- **Atwoods Ltd** –Director
- **Birchwood Investment Management Ltd** - Managing Director
- **Broom Consultants Ltd** - Managing Director
- **Broom Consultants Ltd** - Director
- **Burlington Associates Ltd** - Managing Director
- **Burwood Sage + Brookridge** –Director
- **Burwood Sage + Brookridge** –Managing Director
- **Capital Tower Ltd** - Managing Director
- **Certus Financial Planning Ltd** - Managing Director
- **Certus Financial Planning Ltd** –Director
- **Chadney Bulgin LLP** - Partner
- **Clairville York** - Director
- **Clairville York** - Managing Director
- **Clairville York** - Director
- **Clifton Asset Management Plc** –Group Financial Planning & Business Development Director

### Strategic Partner



### Sponsors



- **Crowe Clark Whitehill Financial Services Limited** - *Managing Director*
- **Cube Financial Planning** - *Director*
- **Dartington Wealth Management** –*Managing Director*
- **Dartington Wealth Management** –*Employee Benefits & Pension Scheme Manager*
- **David Jameson Ltd** - *Managing Director*
- **Ergo Wealth Ltd** – *Chief Executive Officer*
- **Executive Advisory Services Limited** - *Director*
- **Executive Advisory Services Limited** - *Chairman*
- **Fiducia Wealth Management Limited** - *Managing Director*
- **Future Asset Management LLP** - *Managing Partner*
- **Generation Financial Services Ltd** - *Director*
- **Go IFA Ltd** - *Managing Director*
- **Grosvenor Wealth Management Ltd** - *Head of Strategy and Risk Management*
- **Headley Financial Services Ltd** - *Managing Director*
- **HB Dobbin Financial Planning** –*Director*
- **Higgins Fairbairn Advisory LLP** - *Managing Partner*
- **Investors Planning Associates Ltd** –*Chief Executive*
- **Jigsaw Compliance Services** –*Compliance Consultant*
- **John Lamb LLP** - *Managing Director*
- **Joseph Lamb** –*Chief Executive Officer*
- **Paul Young Independent Financial Advisors** –*Partner*
- **Paul Young Independent Financial Advisors** –*IFA*
- **Pharon Independent Financial Advisers Ltd** - *Director*
- **Prosperity IFA** - *Compliance Director*
- **Provident Wealth** –*Managing Director*
- **Redbourne Wealth Management** - *Managing Director*
- **Regency Investment Services Ltd** - *Director*

- **Regency Investment Services Ltd** –*Managing Director*
- **Rouse Ltd** - *Managing Director*
- **Succession Group** - *Financial Wealth Planner*
- **The Retirement Adviser (part of LEBC)** - *Divisional Director*
- **The Spectrum Partnership LLP** - *Senior Partner*
- **Tom French & Associates Ltd** - *Compliance Director*
- **Tom French & Associates Ltd** - *Investment Director*
- **Walden Capital** - *Director*
- **Walden Capital** –*Chief Executive Officer*
- **Walpole Financial Limited** - *Financial Planner*

## **STRATEGIC PARTNER**

- **Carmignac** –*Head of Retail*

## **SPONSORS**

- **Architas** –*Head of Intermediary Distribution*
- **Architas** – *Investment Development Manager*
- **Benchmark Capital** – *Group Director*
- **Blackrock iShares** –*Vice President*
- **Blackrock iShares** –*Vice President, Wealth Management Sales UK*
- **JM Finn** –*Director of Intermediary Solutions*
- **Momentum Global Investment Management Ltd** –*Head of UK Retail Sales*
- **Square Mile** –*Director*
- **Synaptic Software** –*Managing Director*
- **Synaptic Software** –*Sales Director*
- **Thesis Asset Management** –*Business Development Manager*
- **Tilney BestInvest** – *Director, Financial Intermediaries*
- **Vanguard** –*Head of Retail Sales*



## **FACILITATORS, SPEAKERS AND EXPERTS**

- **Blackrock iShares** – *Head of Business Strategy*
- **Capgemini Consulting, Financial Services** –*Principal - Wealth, Long Term Savings & Insurance*
- **EY-** *Executive Director - EMEA Financial Services*
- **Ghilaine & Co** –*Founder*
- **Jigsaw Tree** - *Founder & Director*
- **MoneyHub** - *Managing Director*
- **Owen James Group** –*Consultant*
- **Parkwell** – *Senior Consultant*
- **Rennison Consulting Limited** – *Director*
- **Rory Curran Consulting** –*Founder*
- **Scydonia Wealth Markets Consulting** – *Director*
- **Synaptic Software** –*Product Marketing*
- **Thesis Asset Management** – *Office Director, Investment Manager*
- **Tilney BestInvest** – *Investment Director*
- **Vanguard** – *Senior Investment Strategist*