

Sponsors



Participant List

- **Advies Private Clients, IFA**
- **Aim Independent Ltd, Managing Director**
- **Aspirations Financial Advice Ltd, Director**
- **Aspirations Financial Advice Ltd, Director**
- **Atwoods Ltd, Managing Director**
- **Birchwood Investment Management Ltd, Chairman**
- **Blackstone Moregate Ltd, Director**
- **Broom Consultants Ltd, Director**
- **Broom Consultants Ltd, Managing Director**
- **Burlington Associates Ltd, Managing Director**
- **CamOuse Financial Management Limited, Managing Director**
- **Carpenter Box LLP, Partner**
- **Cartlidge Morland, Partner**
- **Cavendish Ware Wealth Management & Financial Planning, Chief Executive Officer**
- **Chadney Bulgin, Partner**
- **Chadwicks, Managing Director**
- **Chiltern Consultancy Ltd, CEO**
- **Chiltern Consultancy Ltd, Managing Director**
- **Chris Leach & Associates Ltd, Managing Director**
- **Church's Financial Planning, Managing Director**
- **Clairville York, Director.**

- **Clairville York**, *Director*
- **Clifton Asset Management PLC**, *Group Financial Planning & Business Development Director*
- **Close Brothers Asset Management**, *Practice Director*
- **Covenham Financial Services Ltd**, *Director IFA*
- **Creative Financial Solutions**, *Director.*
- **Creative Financial Solutions**, *Director*
- **Crowe Financial Planning UK Limited**, *Managing Director, Financial Planning*
- **Cubicstone Capital Management Ltd**, *Managing Director*
- **Druthers Financial Planning**, *Founder and Financial Planner*
- **Ergowealth Ltd**, *Chief Executive Officer*
- **Ergowealth Ltd**, *Investment & Advice Director*
- **Executive Advisory Services Limited**, *Chairman*
- **Executive Advisory Services Limited**, *Director*
- **Fidelius**, *Head of Wealth Management*
- **Fiducia Wealth Management Limited**, *Managing Director & Financial Planner*
- **Financial Planning Partners**, *Managing Director*
- **GWM Financial Planning**, *Chief Executive Officer*
- **Goddard Perry Consulting Ltd**, *Independent Financial Adviser*
- **Grosvenor Corlett Bird Ltd**, *Director*
- **Grosvenor Wealth Management Ltd**, *Director*
- **HB Dobbin Financial Planning**, *Director*
- **HFS Milbourne Financial Services**, *Managing Director*
- **Hanover Wealth Management**, *Director*
- **Headley Financial Services Ltd**, *Director*
- **Holden & Partners LLP**, *Partner*
- **Jigsaw Compliance Services**, *Compliance Consultant*
- **Lynas Vokes Investments Ltd**, *Managing Director*
- **MAP Financial Limited**, *Managing Director*
- **Margetts Wealth Management Ltd**, *Managing Director*
- **Matthew Douglas Ltd**, *Director*
- **Messer & Matthews Ltd**, *Director & Chartered Financial Planner*
- **Montfort International Ltd**, *Principal*
- **Orchard House (IFAs) Ltd**, *Managing Director*
- **P F M Associates Ltd**, *Director*
- **Penney, Ruddy & Winter Ltd**, *Director*
- **Prangle Financial Planning Ltd**, *Financial Planning Director*
- **Premier Financial Management Ltd**, *Director*

- **Prosperity Financial Services Ltd**, *Director and Chartered Financial Planner*
- **Regency Investment Services Ltd**, *Director*
- **Regency Investment Services Ltd**, *Managing Director*
- **Restore UK**, *Director*
- **Rouse Ltd**, *Managing Director*
- **Statehouse Financial Planning and Private Wealth**, *Managing Director*
- **The Shepherds Friendly Society Ltd**, *Director*
- **True Wealth Planning Solutions Ltd**, *Director*
- **Unbiased Financial Group LLP**, *Chartered Wealth Manager*
- **Walden Capital**, *CEO*
- **Walden Capital**, *Director*
- **Wingate Financial Planning**, *Chartered Financial Planner*
- **Wise Investment**, *Senior Financial Planner*
- **Zen Wealth LLP**, *Managing Partner*

SPONSORS & EXPERTS

- **BMO Global Asset Management**, *Director and Fund Manager in the Multi-Asset team*
- **BMO Global Asset Management**, *Director, Head of Distribution Partners*
- **BMO Global Asset Management**, *Director, Head of Distribution, UK Wholesale*
- **Benchmark Capital**, *Business Development Consultant*
- **Benchmark Capital**, *Corporate Development Director*
- **Dimensional Fund Advisors Ltd**, *Regional Director*
- **Dimensional Fund Advisors Ltd**, *Regional Director*
- **Intelliflo**, *Client Solutions Consultant*
- **Intelliflo**, *Client Solutions Manager*
- **Marlborough Fund Managers Ltd**, *Business Development Manager*
- **Marlborough Fund Managers Ltd**, *Head of Business Development & Wealth Management*
- **Old Mutual Wealth**, *Head of Platform Distribution*
- **Old Mutual Wealth**, *Pensions Specialist*
- **Old Mutual Wealth**, *Regional Investment Specialist*
- **Standard Life**, *Head of Regional Distribution*
- **Tatton Investment Management**, *Business Development Director*
- **Tatton Investment Management**, *Sales Director*

FACILITATORS & SPEAKERS

- **Age Wage**, *Director*

- **Bamford Media**, *Founder and CEO*
- **Creating Space**, *Professional Coach*
- **Esperanto Business Solutions**, *Founder*
- **GDR Creative Intelligence**, *SVP Global Innovation*
- **Independent Consultant**, *Consultant*
- **Killik & Co**, *Head of Wealth Planning*
- **Orion Consultancy Limited**, *Consultant*
- **Platforum**, *Research Director*
- **Portland Communications**, *Senior Partner and Chief Advisor*
- **Rennison Consulting Ltd**, *Director*
- **Silverback Consultancy**, *Founder*
- **Soprano Consulting**, *Managing Director*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Financial Conduct Authority**, *Senior Associate - Life Insurance and Financial Advice*
- **PFS (Personal Finance Society)**, *Chief Executive*
- **Standard Life**, *Distribution Director, Sales & Client Enablement - UK Distribution*