

Wealth Management & Private Banking
Thursday 11 June 2015 - The Berkeley Hotel, London

Participant List

INVESTMENT HEADS

- **Bank of Ireland Private Banking** - *Director of Investments*
- **Barclays Wealth** - *Head of Equity Strategy*
- **Brewin Dolphin** - *Head of Research*
- **Brooks Macdonald** - *Investment Director*
- **C Hoare & Co** - *Head of Portfolio Management*
- **C Hoare & Co** - *Head of Investment Strategy*
- **Coutts & Co** - *Managing Director, Head of Investment Office*
- **EFG Private Bank Ltd** - *Director, Investment Management*
- **Fry Family Office** - *Business Development Director*
- **Hawksmoor Investment Management Ltd** - *Investment Director*
- **HSBC Private Bank** - *Head of Private Bank Investment Group*
- **Ingenious Asset Management** - *Investment Director*
- **JM Finn** - *Head of Investment Management*
- **JP Morgan Chase** - *Managing Director of Investment and Product*
- **Kleinwort Benson** - *Chief Investment Officer*
- **Lincoln Private Investment Office** - *Chief Investment Officer*
- **Lloyds Banking Group** - *Head of Investment Strategy & Research, UK Private Banking*
- **London and Capital** - *Partner and Director of Private Investment Office*
- **RBC Wealth Management** - *MD, Head of Portfolio Strategy*
- **Sandaire Investment Office** - *Head of Investment*
- **SEB Private Banking** - *Director, Wealth Structuring*
- **SG Hambros Private Banking** - *Global Chief Investment Officer*

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INVESTMENT MANAGERS



- UBS Wealth Management - *Head of Wealth Planning*
- UBS Wealth Management - *Head IPS UK & Jersey*
- Unigestion UK Ltd - *Executive Director*
- Walker Crips Group - *Chief Investment Officer*

STRATEGIC HEADS

- Affinity Private Wealth - *Managing Director*
- Bank of Ireland Private Banking - *Managing Director*
- Bank of Ireland Private Banking - *Chairman*
- Barclays Wealth - *Managing Director*
- Beauclerc Advisory Services Ltd - *Managing Director*
- Bordier & CIE (UK) PLC - *Chief Executive Officer*
- Boston Group - *Chief Executive Officer*
- Boston Group - *Director*
- Brown Shipley & Co Ltd - *Head of Private Banking*
- Butterfield Private Bank - *Chief Executive Officer (Interim)*
- Close Brothers - *Chief Executive Officer*
- Credit Suisse UK - *Chief Executive Officer*
- Credo Group UK Ltd - *Chief Executive Officer*
- Coutts & Co - *MD, Global Head of Investment Services*
- Deer Creek Advisors LLP - *Chief Executive Officer*
- Fleming Family & Partners Limited - *Managing Director*
- Goldman Sachs - *Chief Supervisory Officer*
- Hassium Asset Management - *CEO & Founding Director*
- JP Morgan International Bank - *Associate General Counsel*
- J Stern & Co - *Analyst*
- Kleinwort Benson - *Chief Executive Officer*

- Lombard Odier Darier Hentsch (UK) Limited - *Chief Executive Officer*
- London & Capital - *Partner*
- Maseco Private Wealth - *Managing Partner*
- Mirabaud & Cie (SA) - *Head of Private Wealth Management*
- Nedbank Private Wealth - *Head of Private Banking UK*
- Nutmeg - *Chief Executive Officer*
- Pictet & Cie (Europe) SA - *Chief Operating Officer*
- Rathbones Brothers Plc - *Director, Corporate Projects*
- Santander UK - *Head of Cater Allen*
- Sarasin & Partners LLP - *Partner*
- Savills - *Director Family Office Services*
- SG Hambros Bank Ltd - *Group Secretary General*
- Smith & Williamson - *Director of Banking*
- St. James's Place Wealth Management - *Director of Audit*
- Standard Life Wealth - *Chief Executive Officer*
- Turcan Connell - *Chief Executive Officer*
- UBS Wealth Management - *Head of UK Domestic*
- Waverton Investment Management Ltd - *Chief Executive Officer*
- Weatherbys Private Banking Ltd - *Head of Wealth Planning*

STRATEGIC PARTNERS

- EY - Keith MacDonald - *Partner, EMEA Head of Wealth*
- EY - Simon New, *Director, Wealth Manager*
- Farrer & Co - David Fletcher, *Partner*
- Farrer & Co - Katy Ruddell, *Partner*
- FNZ - Hugh Evans, *Head of Sales and Marketing*
- Goldman Sachs Asset Management - Kristina Teahan, *Head of UK Discretionary Sales*

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- **Goldman Sachs Asset Management** - Lisa Fanti, *Executive Director, UK Discretionary Sales Manager*
- **Invesco Perpetual** - Will Ellis, *Associate Director*
- **Invesco Perpetual** - Andrew Downing, *Regional Sales Manager*
- **Lazard Asset Management** - Tony Maddock, *Director - Head of Third Party Distribution*
- **Lombard Odier Investment Managers** - Dominick Peasley, *Head of Third Party Distribution (UK/Nordics)*
- **Multrees** - Chris Fisher, *Chief Executive Officer*
- **Vanguard Asset Management** - Janine Menasakanian, *Strategic Account Manager*

SPEAKERS, FACILITATORS & GUESTS

- **BNY Mellon Wealth Management** - Sales Director
- **Digital Revolution Commentator** - Andrew Keen
- **FCA** - Robert Taylor, *Head of Supervision*
- **Independent Consultant** - Kim Hillier, *Independent Consultant*
- **Independent Consultant** - Lance Peltz, *Independent Consultant*
- **Independent Consultant** - Barry Yin, *Independent Consultant*
- **Scorpio Partnership** – Caroline Burkart, *Executive Director*
- **Scorpio Partnership** – Cath Tillotson, *Managing Partner*
- **Scorpio Partnership** - Sebastian Dovey, *Managing Partner, Head of Consulting*
- **Wealth Management Association (WMA)** - Liz Field, *Chief Executive Officer*