

INVESTING IN RETIREMENT

Tuesday 1st March at the Royal College of Physicians, London, NW1 4LE

Participant List

DELEGATES:

Advisory Distributors

Argentis Financial Management - Director, Chartered & Certified Financial Planner

Beaufort Financial Planning - Quality Assurance Manager

CAERUS Financial Ltd - Compliance Director

Coutts & Co - Executive Director, Planning and Advice

David Booler & Co - Head of Compliance

Foster Denovo - Head of Professional Development and Competence

Heartwood Wealth Management - Head of Investment Product

Helm Godfrey Partners Ltd - Managing Director

Intelligent Pensions IFA - Marketing Director

Jardine Lloyd Thompson Group plc - Managing Director, Wealth Management

Mazars Financial Planning Ltd - Central Region Managing Partner

Openwork Limited - Strategy Development and Delivery

Paradigm Group - Investment Director

Retirement Line - CEO

Sandringham Financial Partners - Managing Director

Smith & Williamson - Director

Smith & Williamson - Director of Financial Services

Tenet Group - Distribution & Development Director

The Private Office - Managing Partner

Thomas Miller Investment Ltd - Director, Head of Managed Portfolio Service

threesixty services LLP - Research Manager

threesixty services LLP - Head of Technology Solutions

Willis Owen - Head of Research

Willis Owen - Research Analyst

Winning Advisers

Ablestone Financial Planning - Managing Partner

Aisa Professional - Finance Director

Arrow Financial Services UK Limited - Director

Ascot Lloyd Private Office - Chartered Financial Planner
Ascot Lloyd Private Office - Paraplanner
Atwoods Ltd - Director
Broom Consultants Ltd - Managing Director
Broom Consultants Ltd - Director
Burlington Associates Ltd - Compliance Oversight Manager
CamOuse Financial Management Limited - Managing Director
Capel Court Plc - Business Development Director
Certus Financial Planning Ltd - Managing Director
Clairville York - Director
Clairville York - Managing Director
Clairville York - Director
Clifton Asset Management PLC - Group Financial Planning Director
Cockburn Lucas Independent Financial Consultants Ltd - Managing Director
Corporate & Personal Investment Planning LTD - CEO
David Jameson Ltd - Managing Director
Downing Financial Management Ltd - Director
Executive Advisory Services Limited - Director and Financial Planner
Executive Advisory Services Limited - Chairman
Facts & Figures Financial Planners - Director
Facts & Figures Financial Planners - Director
Fiveways FP –Director
Gem & Co Financial Services - Partner
Go IFA Ltd - Independent Mortgage and Protection adviser
Go IFA Ltd - Compliance and Managing Director Nationwide
HFS Milbourne Financial Services - Joint Managing Director
Higgins Fairbairn Advisory LLP - Managing Partner
Ian Lees & Co Asset Management - Managing Director
iFunds Asset Management - Director
Joseph Lamb - Managing Director
Joseph Lamb - Chief Executive Officer
KMG Independent Ltd - Chartered Financial Planner
KMG Independent Ltd - Financial Planner
Lloyd O'Sullivan IFA - Partner
Lonsdale Services Ltd - Director
Lynas Vokes Investments Ltd - Managing Director
Makemsons Independent Financial Advice - Director
Metcalf Moat Ltd - Director
Metcalf Moat Ltd - Director
Myers Davison Ginger Ltd - Associate Director
New Leaf (Ipw) Ltd - Managing Director

Nicholls Stevens Financial Services - *Principal*
P F M Associates Limited - *Director*
Paul Young IFA - *Partner*
Paul Young IFA - *Managing Director*
Pharon Independent Financial Advisers Ltd - *Sales and Marketing Director*
Quadrant Partnership Limited - *Director*
Regency Investment Services Ltd - *Director*
Regency Investment Services Ltd - *Financial Adviser*
Ridgeways Financial Planning - *Director*
Rowanmoor Consultancy Limited - *Director*
Ryan Gray Hamilton LLP - *Partner*
Smith & Pinching Financial Services Ltd - *Finance Consultant*
Statehouse Private Wealth Limited - *Managing Director*
The Premier Partnership Limited - *Managing Director*
The Retirement Adviser –*Divisional Director*
ThinkAge - *Managing Director*
Williams Financial Planning Limited - *Director*
Williams Financial Planning Limited - *Director*
Wise Investment –*Director*

Private Bankers & Wealth Managers

Brewin Dolphin - *Head of National Intermediaries*
Brown Advisory - *Deputy Head of Private Clients*
Canaccord Genuity Wealth Management - *Chief Executive Officer*
Charles Stanley Plc - *Director, Wealth Management*
Citi Private Bank - *Head of Strategic Asset Allocation*
Close Brothers –*Director – Product Integrated*
Credo Group UK Ltd - *Chief Executive Officer*
FF & P Wealth Planning - *Associate Director*
FF & P Wealth Planning - *Financial Planner*
Heartwood Wealth Management - *Head of Wealth Planning*
Heartwood Wealth Management - *Executive Vice President*
J. Stern & Co LLP - *Director*
JM Finn & Co - *Head of Wealth Planning*
Maseco Private Wealth - *Head of Institutional*
Mirabaud & Cie Private Bankers - *Co-Head of Private Wealth Management*
Nedbank Private Wealth - *Head of Private Banking UK*
Sarasin & Partners LLP - *Business Partner*
Towry - *Head of Product*
UBS Wealth Management UK - *Executive Director, Private Wealth Management*
UBS Wealth Management UK - *Head of Wealth Planning & Sales Management*

Weatherbys Private Banking Limited - *Head of Wealth Planning*

Bank & Brands Distributing Financial Services

Acromas Financial Services - *Head of Retirement*

Age UK - *Commercial Relationship Manager - Financial & Legal Service*

Age UK - *Head of Affinity and Product Development*

Age UK - *Head of Commercial Relationships*

Aspire To Retire - *Principal*

Bank of Ireland - *Chief Executive Officer - Retail (Ireland & UK)*

Barclays Bank - *Director of BFP*

Club Together - *Managing Director*

DMG: MEDIA - *Partnerships Account Manager*

E.ON UK plc - *Head of Partnership*

Equiniti - *Client Account Manager*

HSBC Holdings Plc - *Wealth Development Manager*

HSBC Holdings Plc - *Senior Retirement Strategy*

Jaguar Land Rover - *Global Financial Services Director*

John Lewis (Financial Services) - *Head of Insurance & Banking*

Key Retirement Solutions - *Business Development Director*

Lonsdale Services Ltd - *Director*

Loughborough Building Society - *CEO*

Mail Newspapers - *Head of Mail Finance*

Mansfield Building Society - *CEO*

Market Harborough Building Society - *Head of Sales and Marketing*

Police Mutual - *Product Manager*

Post Office - *Senior Product Manager*

Post Office Money - *Senior Investment Development Manager*

Saga Personal Finance (previously Acromas) - *Head of Wealth and Retirement Products*

Savings Champion - *Director*

Savings Champion - *Chairman*

Skipton Building Society - *Senior Proposition Manager*

Stay Sure - *Chief Executive Officer*

Telegraph Media Group - *Commerce Partnership Manager*

Telegraph Media Group - *Head of Money*

Telegraph Media Group - *Business Development Manager*

The Guardian - *Finance Account Manager*

Time Inc UK (previously IPC Media) - *Group Enterprise Director*

Time Inc UK (previously IPC Media) - *Commercial Director – Financial Services*

Yahoo! - *Agency Sales Manager*

Yahoo! - *Finance Editor*

Yorkshire Building Society - *Partnerships Development Manager*

SPEAKERS:

Barclays Wealth – Greg Davies, *Head of Behavioural Finance*

Department for Work and Pensions – Michael Switsur, *State Pension Policy*

Engage Insight - Chris Davies, *Director*

Financial Conduct Authority – Maggie Craig, *Head of Pension Policy, in Strategy and Competition*

Hargreaves Lansdown Group – Tom McPhail, *Head of Pensions Research*

International Longevity Centre – UK – Ben Franklin, *Head of Economics of Ageing*

Resolution Foundation - The Rt Hon, Lord Willetts, *Executive Chair*

RHC Advantage – Mark Beasley, *Chairman*

The Lang Cat – Michael Barrett, *Consulting Director*

The Pensions Regulator – Andrew Warwick-Thompson, *Executive Director of Regulatory Policy*

SPONSORS:

Aviva Investors - James Tothill, *Head of Third Party Sales*

Aviva Investors - Simon Young, *Investment Sales Manager, Strategic Alliances*

Dignity - Rachel Bartlett, *Strategic Partnership Development Manager*

Dignity - Rachel Newham, *Strategic Partnership Development Manager*

Dignity - Paul Toghill, *Head Of Corporate Partnerships*

Just Retirement Ltd – David Beacham, *Director, Business Development, Intermediary Sales*

Just Retirement Ltd – Damien Conway, *Head of Strategic Accounts*

Just Retirement Ltd – Jan Holt, *Head of Business Development Team*

Seven Investment Management – Robert Poulten, *Head of Sales*

Seven Investment Management – Verona Smith, *Head of Platform*

Seven Investment Management – Matthew Yeates, *Quantitative Investment Manager*