

Advisory Distributors

Tuesday 4 July 2017, Pennyhill Park Hotel, London Road, Bagshot, Surrey GU19 5EU

Strategic Partners



Sponsors



Participant List

BUSINESS STRATEGY

- **2plan Wealth Management**, *Chief Executive Officer*
- **Alexander House Financial Services Ltd.**, *Chief Operating Officer*
- **Attivo Group**, *Chief Executive Officer*
- **Beaufort Group**, *CEO*
- **Beaufort Group**, *Group Chairman*
- **Beaufort Group**, *Head of Distribution*
- **Continuum (Financial Services) LLP**, *Head of Partnership Development*
- **Continuum (Financial Services) LLP**, *Managing Partner*
- **Fairstone Financial Management Ltd**, *National Development Director*
- **Foster Denovo**, *CEO*
- **Helm Godfrey Partners Ltd**, *Managing Director*
- **Intrinsic Financial Services**, *Managing Director*
- **Jelf Mercer Financial Planning**, *Head of Financial Planning*

- **Loyal North**, *Business Development Director*
- **Medical Money Management Group**, *Partner*
- **New Leaf Distribution**, *Compliance Director*
- **Openwork Ltd**, *Wealth & Platform Director*
- **Paradigm Norton**, *Chief Executive Officer*
- **Paradigm Norton**, *Client Director*
- **Personal Touch Financial Services**, *CEO*
- **Pi Financial Ltd**, *CEO*
- **Punter Southall Financial Management Ltd**, *Principal*
- **RSMR**, *Managing Director*
- **Sandringham Financial Partners**, *Chief Executive Officer*
- **Sanlam UK**, *Chief Executive Officer*
- **St. James's Place Wealth Management Group**, *Head of Large Business Acquisition*
- **Tenet Group**, *Chief Executive Officer*
- **Tenet Group**, *Group Distribution & Development Director*
- **The Private Office**, *CEO*
- **Thomas Miller Investment Ltd**, *Managing Director*
- **Whitechurch Securities Ltd**, *Financial Planning Director*
- **Willis Owen**, *Managing Director*

INVESTMENT

- **Bankhall Investment Associates Ltd**, *Head of Client Propositions*
- **Bellpenny**, *Head of Investment & Avellemy*
- **Grant Thornton**, *Partner, Financial Planning*
- **Intrinsic Financial Services**, *Chief Executive Officer*
- **Munnypot**, *Co Founder*
- **Nationwide Building Society**, *Financial Planning Director*
- **Succession Advisory Services Ltd**, *Platform and Investment Director*
- **Tavistock Investments Plc**, *Group Operations Director*
- **Tavistock Partners Ltd**, *Head of Proposition*
- **Tilney Group**, *Head of Financial Planning*

STRATEGIC PARTNERS & EXPERTS

- **Architas Multi Manager**, *Key Account Director*
- **BlackRock iShares**, *Head of UK Wealth, iShares EMEA*
- **BlackRock iShares**, *Head of iShares UK Intermediary Sales*

- **Carmignac**, *Head of Retail*
- **Carmignac**, *Sales Manager*
- **PIMCO Europe Ltd**, *Vice President - Global Wealth Management, UK*
- **PIMCO Europe Ltd**, *Vice President - Global Wealth Management, EMEA*

SPONSORS & EXPERTS

- **Aviva Investors**, *Head of Third Party Sales*
- **Dimensional Fund Advisors Ltd**, *Regional Director*
- **Dimensional Fund Advisors Ltd**, *Regional Director*
- **Dynamic Planner**, *Chief Executive Officer*
- **Dynamic Planner**, *Director Financial Advice & Wealth Firms*
- **Fundsnetwork**, *Associate Director - Key Accounts*
- **Fundsnetwork**, *Head of Key Account Sales*
- **GAM UK Ltd**, *Head of UK Strategic Partnerships*
- **Goldman Sachs Asset Management International**, *Executive Director*
- **Goldman Sachs Asset Management International**, *Executive Director*
- **Goldman Sachs Asset Management International**, *Managing Director, Global Head of Strategic Advisory Solutions*
- **INVESCO Perpetual**, *Associate Director, Financial Institutions Group*
- **INVESCO Perpetual**, *Regional Sales Manager, Invesco Perpetual, London, City & West End*
- **SEI Wealth Platform**, *Business Development Director*
- **Schroders Plc**, *Co-Head of UK Intermediary Business*
- **Vanguard**, *Head of Retail Sales*

FACILITATORS & SPEAKERS

- **Capgemini Consulting, Financial Services**, *Principal - Wealth, Long Term Savings & Insurance*
- **Capgemini Consulting, Financial Services**, *Vice President - Wealth, Long Term Savings & Insurance*
- **EY**, *Senior Adviser*
- **KPMG**, *Head of M&A*
- **Milliman UK**, *Head of Strategy Consulting*
- **Rennison Consulting Ltd**, *Director*
- **Scydonia Wealth Markets Consulting**, *Director*
- **Volume4 Consulting**, *Founder*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **APFA (Association of Professional Financial Advisers)**, *Director General*
- **Between Jobs**, *Partner, Wealth Planning Director*
- **Chartered Institute for Securities & Investment**, *Head of Financial Planning*
- **Financial Conduct Authority**, *Manager Advisory Supervision Team*
- **Financial Conduct Authority**, *Retail Investments Supervision*