

Sponsors



Participant List

- **2 Plan Wealth Management**, *Managing Director*
- **Argentis Financial Planning**, *Head of Mergers & Acquisitions*
- **Blevins Franks Financial Management**, *Head of Proposition*
- **Blevins Franks Financial Management**, *Head of Wealth Structuring*
- **Brewin Dolphin**, *Head of Birmingham & Oxford*
- **Charles Stanley**, *Head of Asset Management*
- **Charles Stanley**, *Managing Director - Charles Stanley Central Financial Services & Chief Client Officer*
- **Clifton Asset Management**, *Director*
- **Colmore Partners**, *Financial Planning Director*
- **Consumer Duty Alliance**, *Chief Executive Officer*
- **Continuum**, *Head of Partnership Development*
- **Fidelius**, *Chief Executive Officer*
- **Fintel IQ**, *Chief Sales Officer*
- **Grant Thornton**, *Head of Financial Services M&A*
- **HFMC Wealth Management**, *Chief Operating Officer*
- **Integrity365**, *Chief Executive Officer*
- **Isio**, *Consultant - Former CEO Tenet*
- **Loyal North**, *Acquisitions Director*
- **Loyal North**, *Adviser to the Board*
- **M&G Wealth**, *Operations & Business Development Director*
- **MKC Wealth**, *Chief Technology Officer*
- **MWA Financial**, *Director & Head of Operations*
- **Mazars Financial Planning**, *Partner*
- **Openwork**, *Commercial Director*

- **Openwork**, *Proposition Director*
- **Origen Financial Services**, *Director, Proposition and Marketing*
- **Parmenion Capital Partners**, *Commercial Director*
- **Pembroke Financial Services**, *Head of Advice Proposition*
- **Pi Financial**, *Business and Development Director*
- **Platforum**, *Head of Editorial Strategy*
- **RSMR**, *Director*