

## Sponsors



## Participant List

### BUSINESS STRATEGY

- **2 Plan Wealth Management**, *Managing Director*
- **Ascot Lloyd**, *Acquisitions Director*
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- **Blevins Franks Financial Management**, *Head of Wealth Structuring*
- **Charles Stanley**, *Director Foundation Planning*
- **Charles Stanley**, *Head of Asset Management*
- **Charles Stanley**, *Managing Director - Charles Stanley Central Financial Services & Chief Client Officer*
- **Clifton Asset Management**, *Director*
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- **Continuum**, *Managing Partner*
- **Defaqto**, *Chief Executive Officer*
- **Fintel**, *Chairman*
- **Foster Denovo**, *Chief Executive Officer*
- **Kingswood**, *Chief Executive Officer*
- **Loyal North**, *Acquisitions Director*
- **Loyal North**, *Adviser to the Board*

- **Mattioli Woods**, *Strategic Partnerships Director*
- **Mazars Financial Planning**, *Head of Financial Planning*
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- **Pi Financial**, *Chief Executive Officer*
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- **St. James's Place Wealth Management**, *Head of Marketing*
- **The Private Office**, *Chief Marketing Officer*
- **Timothy James and Partners**, *Director*
- **True Potential Wealth Management**, *Chief Executive & Senior Partner*
- **Willis Owen**, *Managing Director*

## INVESTMENT

- **Blevins Franks Financial Management**, *Head of Proposition*
- **Kingswood**, *Managing Director - Head of Wealth Planning*
- **Magus Private Wealth**, *Chief Executive Officer and Chief Investment Officer*
- **My Time Pension**, *Founder*
- **Nedbank Private Wealth**, *Executive Head of Wealth Management*
- **Openwork Limited**, *Proposition Director*
- **Paradigm**, *Head of Proposition*
- **Pembroke Financial Services**, *Head of Advice Proposition*
- **The Private Office**, *Partner & Financial Planner*
- **Validpath**, *Succession Director*

## FACILITATORS & SPEAKERS

- **Catalyst Partners**, *Director*
- **Catalyst Partners**, *Divisional Director of Mergers & Acquisitions*
- **JoyndUp**, *Director*
- **Keynote Speaker**, *Keynote Speaker | Gen AI, Robotics, Emerging Technologies & Google X Advisor | ex-Waymo*
- **Melo**, *Chief Innovation Officer & Director of Progress*

- **Mint Blue Consulting Ltd**, *Owner and Director*
- **Silverback Consultancy**, *Founder & Director*
- **Solve**, *Director Consultant*

## **INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS**

- **Financial Conduct Authority**, *Head of Department (Advisers, Wealth and Pensions)*
- **Independent Consultant**, *Strategic Adviser*