

## Sponsors



## Participant List

- **2 Plan Wealth Management**, *Managing Director*
- **Absolute Financial Management**, *Managing Director*
- **Argentis Financial Planning**, *Chief Client Officer*
- **Ascot Lloyd**, *Acquisitions Director*
- **Atomos**, *Head of Client Delivery & Innovation*
- **Atomos**, *Managing Director, Financial Planning*
- **Aviva**, *Managing Director for Wealth & Advice*
- **Barclays Wealth & Investment Management UK**, *Managing Director & Global Head of Distribution for Banking and Credit Barclays Private Bank*
- **Benchmark Capital**, *Commercial Director*
- **Blevins Franks Financial Management**, *Head of Proposition*
- **Blevins Franks Financial Management**, *Head of Wealth Structuring*
- **CFO & More**, *Director*
- **Charles Stanley**, *Director of CSD Advice and Guidance*
- **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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- **Consumer Duty Alliance**, *Chief Executive Officer*
- **Continuum (Financial Services)**, *Managing Partner*
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- **Finli Group**, *Chief Executive Officer*
- **Fintel IQ**, *CSO. Fintech and Financial Services*
- **Fintel**, *Group Joint CEO*
- **Fintel**, *Managing Director*
- **Foster Denovo**, *Chief Executive Officer*
- **Grant Thornton**, *Head of Financial Services M&A*
- **Hargreaves Lansdown Asset Management Limited**, *Head of Advisory Operations*
- **Kingswood**, *Chief Executive Officer*
- **Kingswood**, *Managing Director Wealth Planning*
- **Liberate Wealth**, *Chief Executive Officer*
- **Loyal North**, *Acquisitions Director*
- **Loyal North**, *Adviser to the Board*
- **M&G Wealth**, *Managing Director - M&G Wealth Advice*
- **M&G Wealth**, *Operations & Business Development Director*
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- **Mattioli Woods**, *Strategic Partnerships Director*
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- **Nationwide Building Society**, *Head of Investments*
- **Nedbank Private Wealth**, *Executive Head of Wealth Management*
- **New Leaf Distribution**, *Investment Director*
- **New Leaf Distribution**, *Managing Director*
- **One Four Nine Group**, *Chief Executive Officer*
- **One Four Nine Group**, *Chief Operating Officer*
- **Openwork**, *Commercial Director*
- **Openwork**, *Proposition Director*
- **Paradigm Norton Financial Planning**, *Chief Executive Officer*
- **Paradigm Norton Financial Planning**, *Head of Technical*
- **Paradigm**, *Head of Proposition*
- **Parmenion Capital Partners**, *Chief Commercial Officer*

- **Parmenion Capital Partners**, *Commercial Director*
- **Pembroke Financial Services**, *Head of Advice Proposition*
- **PFS (Personal Finance Society)**, *Interim Chief Executive Officer*
- **Pi Financial**, *Business and Development Director*
- **Pi Financial**, *Chief Executive Officer*
- **Platforum**, *Head of Editorial Strategy*
- **Quilter**, *Mergers and Acquisitions Director*
- **St. James's Place Wealth Management Group**, *Commercial Director*
- **St. James's Place Wealth Management Group**, *Divisional Director, Business Development & Advice*
- **St. James's Place Wealth Management Group**, *Head of Marketing*
- **St. James's Place Wealth Management**, *Head of Marketing*
- **Succession Wealth**, *Managing Director*
- **TWP Financial Planning**, *Managing Director*
- **Tavistock Investments**, *Corporate Development Director*
- **The Private Office**, *Chief Financial Officer*
- **The Private Office**, *Chief Marketing Officer*
- **The Private Office**, *Chief People Officer*
- **The Private Office**, *Snr Partner & Financial Planner*
- **Threesixty services**, *Chief Executive Officer*
- **Timothy James and Partners**, *Director*
- **Tribe Impact Capital**, *Partner - Head of Adviser Team*
- **True Potential Wealth Management**, *Chief Executive & Senior Partner*
- **Validpath**, *Chief Operating Officer*
- **Validpath**, *Succession Director*
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- **Willis Owen**, *Managing Director*
- **Wren Sterling Financial Planning**, *Head of Research*

## SPONSORS & EXPERTS

- **Dimensional Fund Advisors**, *Head of Client Communications, EMEA & Vice President*
- **Dimensional Fund Advisors**, *Regional Director and VP*
- **Dimensional Fund Advisors**, *Regional Director*
- **Downing**, *Partner and Head of Energy and Infrastructure*
- **Downing**, *Partner and Head of Strategic Partnerships*
- **Dynamic Planner**, *Enterprise Development Director*
- **GSAM**, *Executive Director, UK & Ireland Retail Client Business*

- **GSAM**, *Head of Business Strategy, GSAM Strategic Advisory Solutions*
- **GSAM**, *Managing Director, Head of UK & Ireland Retail Distribution*
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- **HSBC Asset Management**, *Director UK Intermediary*
- **HSBC Asset Management**, *Head of UK Intermediary Business Development*
- **Hymans Robertson Investment Services**, *Head of Key Accounts*
- **INGENIOUS**, *Business Development Director*
- **Puma Investments**, *Founder & Group Chief Executive Officer*
- **Puma Investments**, *Head of Strategic Partnerships*
- **Puma Investments**, *Strategic Partnerships Executive*
- **Seccl Technology**, *Head of growth*
- **Seccl Technology**, *Strategic development director*
- **TIME Investments**, *Distribution Director and Partner*
- **TIME Investments**, *Head of Equity Funds*
- **TIME Investments**, *Strategic Partnerships Manager*

## **FACILITATORS & SPEAKERS**

- **Catalyst Partners**, *Director*
- **Catalyst Partners**, *Divisional Director of Mergers & Acquisitions*
- **JoyndUp Ltd**, *Director*
- **Keynote Speaker**, *Chief Research Officer*
- **Keynote Speaker**, *Keynote Speaker I Gen AI, Robotics, Emerging Technologies & Google X Advisor*  
*|ex-Waymo/Google*
- **Melo**, *Chief Negotiator (Exits)*
- **Silverback Consultancy**, *Founder & Director*
- **Solve**, *Solution Director*
- **Tata Consultancy Services (TCS)**, *Head of UK FS Customer Transformation*
- **Victoria Humphries**, *Business resilience trainer*
- **Wild Ochre Consulting**, *Founder*

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

- **Common Sense Implementations**, *Founder And Director*
- **Dorsum**, *Senior Consultant*
- **Financial Conduct Authority**, *Head of Department (Advisers, Wealth and Pensions)*
- **Independent Consultant**, *Strategic Adviser*