

A Meeting of Minds - Gatekeepers October 2024

Thursday 17 October 2024, The Berkeley Hotel, Wilton Place, Knightsbridge, London, SW1X 7RL

## Sponsors



## Participant List

- **AJ Bell**, *Head of Investment Research*
- **Alder Investment Management**, *Chief Investment Officer*
- **Atomos Investments**, *Head of portfolio management*
- **Atomos**, *Head of High Net Worth*
- **Broadstone**, *Investment Director*
- **Canaccord Genuity Wealth Planning**, *Head of equity fund research*
- **Cavendish Ware**, *CIO & Head of Investment*
- **Charles Stanley**, *Head of Asset Management*
- **City Asset Management**, *Chief Investment Officer*
- **Copia Capital Management**, *Head of investments*
- **Coutts & Co**, *Head of Fund Research*
- **Crocus Wealth**, *Investment Director*
- **Defaqto**, *Insight Manager (Funds and DFM)*
- **Downing**, *Fund Manager*
- **Fidelius**, *Investment Analyst*
- **Fintel**, *Head of Investment Management Compliance Fintel; Head of Signature*
- **Hay Hill Wealth Management**, *Chief Investment Officer*
- **Hywin Wealth**, *Head Of Investment*

- **IBOSS Asset Management**, *Chief investment officer*
- **Independent Wealth Planners**, *Chief Investment Officer*
- **Investec Wealth & Investment**, *Head of Equity Collectives*
- **Investec Wealth & Investment**, *Head of Fixed Income Collectives*
- **J. Stern & Co**, *Investment Specialist and Client Director*
- **Kingswood**, *Chief Operating Officer*
- **LeifBridge Investment Services**, *Investment Manager*
- **MI Capital Research**, *Head of Research*
- **Morningstar**, *Global Head of Manager Selection, Due Diligence Services*
- **NFU Mutual Investment Services**, *Fund Selection Manager*
- **Parmenion Capital Partners**, *Head of Investments and CIO*
- **Pfarmigan Capital**, *Director & CEO*
- **Quilter Financial Planning**, *Managing Director of Quilter Financial Advisers, National Advice Business*
- **RSMR**, *Director*
- **Raymond James Investment Services**, *Head of Investment Solutions*
- **Redington**, *Senior vice president, manager research*
- **SG Kleinwort Hambros Bank**, *Head of Portfolio Construction*
- **Square Mile Investment Services**, *Associate Director - Responsible Investment*
- **Square Mile Investment Services**, *Head of Research*
- **TAM Asset Management**, *CIO*
- **The Private Investment Office**, *Co-Founder & Joint Managing Director*
- **Tribe Impact Capital**, *Business Development Manager*
- **Tribe Impact Capital**, *Partner*
- **Weatherbys Banking Group**, *Head of Investments*

## **FACILITATORS & SPEAKERS**

- **Asset Risk Consultants**, *Managing Director*
- **Freelance**, *Journalist and consultant*
- **Independent Consultant**, *Strategic Advisor*
- **Independent**, *Consultant*
- **Keynote Speaker**, *Marketing, Data, Analytics Lead and Broadcaster*
- **Maanch**, *CEO & Founder*
- **University of Kent**, *?Professor of Politics*