

Sponsors



Participant List

- **Amber Wealth Creation Ltd**, *Paraplanner*
- **Atomos**, *Paraplanner*
- **Atomos**, *ParaplannerStreet*
- **Baker Gladstone & York Ltd**, *Adviser*
- **Brown Shipley & Co Limited**, *Client Associate*
- **CIMB Bank**, *Financial Crime Executive*
- **Canaccord Genuity Wealth Planning Ltd**, *Senior Paraplanner*
- **Cavendish Medical Ltd**, *Senior Assistant Financial Planner*
- **Cavendish Ware Limited**, *Financial Planner*
- **Chetwood Wealth Management Ltd**, *Technical Director*
- **Church's Financial Planning**, *Administrator*
- **City Asset Management Plc**, *Paraplanner*
- **Clairville York - acquired by Independent Wealth Planners**, *Trainee Paraplanner*
- **Close Brothers Asset Management**, *Chartered Paraplanner*
- **Close Brothers Asset Management**, *Client Service Executive*
- **Close Brothers Asset Management**, *Paraplanner*
- **Close Brothers Asset Management**, *Technical Adviser*
- **Colmore Partners**, *Paraplanner*
- **EBCam Limited**, *Paraplanner*
- **Evelyn Partners**, *Business Development Executive*
- **Evelyn Partners**, *Relationship Manager*
- **Fairey Associates Ltd**, *Paraplanner*
- **Fidelius**, *Client Service Manager*
- **Fidelius**, *Senior Paraplanner*

- **Fiducia Wealth Management Limited**, *Senior Paraplanner*
- **Foster Denovo**, *Paraplanner Manager*
- **Gerrard Stuart Financial Services Limited**, *Senior Paraplanner*
- **H V Financial Planning Ltd**, *Manager*
- **HFMC Wealth Management Ltd**, *Chartered Financial Planner and Senior Technical Consultant*
- **HFMC Wealth Management Ltd**, *Senior Private Client Administrator*
- **Handelsbanken plc**, *Head of Wealth Planning*
- **High View Paraplanning**, *Paraplanner*
- **High View Paraplanning**, *Trainee Paraplanner*
- **Holden & Partners LLP**, *Paraplanning Manager*
- **JM Finn & Co Ltd**, *Paraplanner*
- **King Financial Planning - AR of Tavistock**, *Paraplanner*
- **LGT Wealth Management**, *Paraplanner*
- **Lucas Fettes & Partners (Financial Services) Ltd**, *Paraplanner*
- **MKC Wealth Ltd**, *Head of Technical Specialists*
- **Miller Mercer Colson Financial Planning**, *Technical Manager*
- **NLP Financial Management Ltd**, *Paraplanner*
- **NLP Financial Management Ltd**, *Senior Paraplanner*
- **New Leaf Distribution**, *Paraplanner*
- **New Leaf Distribution**, *Trainee Paraplanner*
- **Nova Wealth (formerly Octopus Wealth)**, *Junior paraplanner*
- **Nova Wealth (formerly Octopus Wealth)**, *Paraplanner*
- **OCM Wealth Management**, *Senior Paraplanner*
- **Oakfield Financial Services Limited**, *Paraplanner*
- **Pall Mall Financial Independence Limited**, *Paraplanner*
- **Parafinity**, *CEO*
- **Pharon Independent Financial Advisers Limited**, *Chartered Financial Planner and Paraplanner Manager*
- **Pharon Independent Financial Advisers Limited**, *Paraplanner*
- **Pharon Independent Financial Advisers Limited**, *Paraplanner*
- **Pivotal Paraplanning**, *Director/Paraplanner*
- **Prismatic Wealth Limited**, *Head of Paraplanning*
- **Quilter plc**, *Paraplanner*
- **Raymond James Investment Services Ltd**, *Chartered Paraplanner*
- **S4 Financial Ltd**, *Paraplanner*
- **SG Kleinwort Hambros Bank Limited**, *Associate Private Banker*
- **Sandringham Financial Partners Ltd A/R M&G plc**, *Chief Commercial Officer*

- **Saunderson House Limited**, *Assistant Financial Planner (Paraplanner)*
- **Saunderson House Limited**, *Assistant Financial Planner*
- **Saunderson House Limited**, *Associate Financial Planner*
- **St. James's Place Wealth Management Group**, *Head of Business Improvement*
- **Stonehage Fleming Group**, *Technical Planning Manager*
- **The Fry Group**, *Head of Paraplanning*
- **The Paraplanner Club**, *Head of Paraplanning*
- **The Private Office**, *Associate Director Of Client Delivery*
- **The Private Office**, *Paraplanner Manager*
- **Timothy James and Partners Ltd**, *Finance Executive*
- **Walden Capital**, *Paraplanner & Mortgage Co-Ordinator*
- **Walden Capital**, *Senior Paraplanner*
- **Walden Capital**, *Wealth Administrator*
- **Wingate Wealth Management Ltd**, *Paraplanning Team Manager*
- **Wise Investment**, *Paraplanner*

SPONSORS & EXPERTS

- **HSBC Asset Management (UK) Limited**, *Multi-Asset Investment Specialist*
- **HSBC Asset Management (UK) Limited**, *Sales Director, UK Intermediary, London & Southeast*
- **Standard Life UK (part of the Phoenix Group)**, *Head of Retail Distribution*
- **Standard Life UK (part of the Phoenix Group)**, *Head of Strategic Partnerships*

FACILITATORS & SPEAKERS

- **Davies Group**, *Senior Consultant - Asset & Wealth Management*
- **Door**, *Head of Business Development, EMEA*
- **Keynote Speaker**, *4 Time Paralympian, Triple World Champion, Disability Advocate*
- **Keynote Speaker**, *Director of the Institute for Government*
- **Keynote Speaker**, *PhD aka Dr Rock*
- **Owen James Events**, *Managing Director*
- **Pano Technologies**, *CCO*
- **PwC**, *Manager - Customer Led Transformation*
- **Savanta**, *Director, Client Development*
- **Savanta**, *Director*