

## Participant List

- **Affinity Private Wealth**, *Chief Executive Officer*
- **Atomos Investments**, *Chief Executive Officer*
- **Beaucherc Advisory Services**, *Executive Partner*
- **Brewin Dolphin**, *Chief of Staff - Wealth Management Europe*
- **Brewin Dolphin**, *Investment Director*
- **Brewin Dolphin**, *Strategic Business Director*
- **Brown Shipley & Co**, *CEO*
- **Connor Broadley**, *Co-Founder & Director*
- **Credo**, *Chief Investment Officer*
- **Credo**, *Director and Head: Private Clients*
- **Deutsche Bank UK Bank**, *Director of Family Offices*
- **Fintel**, *Head of Investment Management Compliance SimplyBiz DFM*
- **Hawksmoor Investment Management**, *Head of Investment Management*
- **Indosuez Wealth Management**, *Managing Director*
- **J. Stern & Co**, *Client Director*
- **Julius Baer International**, *Chief Executive Officer*
- **London and Capital Wealth Advisers**, *Partner & Chief Executive Officer*
- **London and Capital Wealth Advisers**, *Partner & Head of the Private Investment Office*
- **Mirabaud Investment Management**, *Director, Senior Private Banker*
- **Mirador Solutions Consultancy**, *CEO*
- **Quartet Capital Partners**, *Managing Partner*
- **Quilter Financial Planning**, *National Sales Director*
- **RBC (Royal Bank of Canada)**, *Head of Banking & Custody, RBC Wealth Management Europe*
- **SG Kleinwort Hambros Bank**, *Group Commercial Director*
- **SG Kleinwort Hambros Bank**, *Head of Client Solutions Group*
- **Seven Investment Management**, *Managing Director, Private Clients*
- **Six Degrees Wealth**, *Co-Founder*
- **St. James's Place Wealth Management Group**, *Director of Partner Engagement and Consultancy*

- **St. James's Place Wealth Management Group**, *Divisional Director, Private Client Strategy & Banking*
- **Standard Chartered Bank**, *Executive Director*
- **Thomson Tyndall**, *Investment Director*
- **Tyndall Investment Management**, *Director, Private Clients*
- **Waverton Investment Management Limited**, *Chief Executive Officer*
- **Weatherbys Banking Group**, *Group Chief Executive*