

Participant List

- **Access Wealth Management**, *Partner*
- **Aisa Professional**, *Chairman of the Investment Committee*
- **Alan Boswell & Co**, *Director*
- **Armstrong Watson Financial Planning**, *Financial Planning Director – Operations & Commercial*
- **Atomos**, *Portfolio Manager*
- **Azets**, *CEO*
- **Berry & Oak**, *Operations Director*
- **Boolers**, *Business Owner & Chartered Financial Planner*
- **Broom Consultants**, *Managing Director*
- **Canford & Castle Financial Planning**, *Director*
- **Cavendish Ware**, *Director*
- **Corporate & Personal Investment Planning**, *Chief Executive Officer*
- **Darsco Wealth Management**, *Director*
- **Fensham Howes**, *Managing Director, Private Client*
- **Finli**, *Director & Independent Financial Planner*
- **Finli**, *Managing Director*
- **Flowers McEwan**, *Director*
- **Gerrard Stuart Financial Services**, *Director*
- **Grosvenor Wealth Management**, *Director*
- **IFT Wealth Management**, *Director*
- **Ideal Financial Management**, *Financial Planner / Director*
- **Informed Financial Planning**, *Managing Director*
- **Intelligence Wealth Management**, *Director*
- **Landmark**, *Director*
- **Lockhart Consultancy**, *Director*
- **Lycetts Financial Services**, *Divisional Director, Financial Services*
- **Lynas Vokes Investments**, *Managing Director*
- **Mindful Financial Planning**, *Director*

- **Mint Wealth Management**, *MD & Founder*
- **Rennie Risk Management**, *Business Risk Consultant*
- **Rice Whatmough Crozier**, *Senior Partner*
- **Symphony Financial Advisers**, *Director*
- **Symphony Financial Advisers**, *Managing Director*
- **Treowe Wealth Advisers**, *Director*
- **True Wealth Group**, *Financial Planner*
- **Verso Wealth Management**, *Co Founder & CEO*
- **Walden Capital**, *Chief Executive Officer*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **The Flower Group**, *Chief Executive Officer*