

## Sponsors



## Participant List

- **Adviser Business Solutions**, *Director*
- **Aisa Professional**, *Chairman of the Investment Committee*
- **Aisa Professional**, *Director*
- **Aisa Retirement Planning**, *Director*
- **Alan Boswell & Co**, *Director*
- **Blackstone Moregate**, *Chief Executive Officer*
- **Blackstone Moregate**, *Director*
- **Blaxsell Financial Planning**, *Director*
- **Broom Consultants**, *Director*
- **Broom Consultants**, *Managing Director*
- **Burlington Associates**, *Managing Director*
- **Cavendish Ware**, *Director*
- **Chiltern Consultancy**, *Managing Director*
- **Chris Leach & Associates**, *Managing Director*
- **Church's Financial Planning**, *Managing Director*
- **Clairville York**, *Chief Executive*
- **Clark Gillone**, *Director*
- **Clifton Asset Management**, *Group Business Development Manager*

- **Cormorant Partnership**, *Partner*
- **Crowe Financial Planning**, *Managing Director, Financial Planning*
- **Crowe Financial Planning**, *Operations Director*
- **Douglas Steers & Company**, *Director*
- **Dynamic Wealth**, *Financial Planner/Retirement Expert*
- **Executive Advisory Services**, *Director*
- **FLP Group**, *Director & Independent Financial Planner*
- **FS247**, *Financial Planner & Principal Partner*
- **Generation Financial Services**, *Consultant*
- **Generation Financial Services**, *Director*
- **Goalkeep**, *Managing Director*
- **H V Financial Planning**, *Director*
- **HB Dobbin Financial Planning**, *Director*
- **Harding Financial**, *Managing Director*
- **Herbert & Webster**, *Managing Director*
- **Holden & Partners**, *Managing Partner*
- **Informed Choice**, *Managing Director*
- **Integrity365**, *Chief Executive Officer*
- **Investment Quorum**, *Chief Executive Officer*
- **John Lamb Hill Oldridge**, *Managing Director*
- **LawlerDavis Independent Financial Planners**, *Director*
- **Lynas Vokes Investments**, *Managing Director*
- **Matthew Douglas**, *Director*
- **Mclaren Capital**, *Managing Director*
- **Mindful Financial Planning**, *Director*
- **Moore Kingston Smith Financial Advisers**, *Chartered Financial Planner & Managing Director*
- **Nicholls Stevens**, *Managing Director*
- **Penney, Ruddy & Winter**, *Director*
- **Pharon Independent Financial Advisers**, *Compliance Director & Chartered Financial Planner*
- **Premier Financial Management**, *Director*
- **Premier Financial Management**, *Director*
- **Richardsons Financial Services**, *Director*
- **Rouse** *Director & Financial Planner*
- **S4 Financial**, *Managing Director*
- **Strategic Solutions Financial Services**, *Partner & Chartered Financial Planner*
- **Syndaxi Chartered Financial Planners**, *Managing Director*

- **Thomson Tyndall**, *Partner*
- **Timothy James and Partners**, *Director*
- **Timothy James and Partners**, *Financial Adviser*
- **Titan Wealth Planning**, *Head of Proposition*
- **Walden Capital**, *Chief Executive Officer*
- **Walden Capital**, *Director*
- **Wise Investment**, *Senior Financial Planner*

## SPONSORS & EXPERTS

- **Tribe Impact Capital**, *Chief Investment Officer*
- **Tribe Impact Capital**, *Co-Founder*
- **Tribe Impact Capital**, *Partner*

## FACILITATORS & SPEAKERS

- **Bovill**, *Principal Consultant*
- **Catalyst Partners**, *Director*
- **Catalyst Partners**, *Partner*
- **Freelance**, *Journalist and consultant*
- **Keynote Speaker**, *Experienced educator, executive coach and leadership team coach*
- **Melo**, *Chief Innovation Officer & Director of Progress*
- **Mint Blue Consulting**, *Owner and Director*
- **Wild Ochre Consulting**, *Founder*

## INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Financial Conduct Authority**, *Head of Department (Advisers, Wealth and Pensions)*
- **Independent Consultant**, *Solicitor, supporting financial advice firms in the UK*
- **The Flower Group**, *Chief Executive Officer*
- **VouchedFor**, *Managing Director*