

## Sponsors



## Participant List

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

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

- **Saunderson House**, *Assistant Financial Planner*
- **Saunderson House**, *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**, *Finance Executive*
- **Walden Capital**, *Paraplanner & Mortgage Co-Ordinator*
- **Walden Capital**, *Senior Paraplanner*
- **Walden Capital**, *Wealth Administrator*
- **Wingate Wealth Management**, *Paraplanning Team Manager*
- **Wise Investment**, *Paraplanner*

## SPONSORS & EXPERTS

- **HSBC Asset Management**, *Multi-Asset Investment Specialist*
- **HSBC Asset Management**, *Sales Director, UK Intermediary, London & Southeast*
- **Standard Life UK**, *Head of Retail Distribution*
- **Standard Life UK**, *Head of Strategic Partnerships*

## FACILITATORS & SPEAKERS

- **Davies Group**, *Senior Consultant - Asset & Wealth Management*
- **Door**, *Head of Business Development, EMEA*
- **Keynote Speaker**, *Four 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*