

# RETIREMENT MATTERS

April 2025 Tuesday 29 April 2025, One Moorgate Place, London, EC2R 6EA

## Participant List

- **Amber Wealth Creation**, *Paraplanner*
- **Apropos Wealth Management**, *Chartered Financial Planner*
- **Bordier & Cie (UK)**, *Head of Wealth Planning*
- **Burlington Associates**, *Compliance & T&C Manger*
- **Cavendish Medical**, *Senior Assistant Financial Planner*
- **Cavendish Ware**, *Associate Director*
- **China Construction Bank**, *Financial Crime Executive*
- **Citi Private Bank**, *Head of Wealth Planning*
- **Clarity Wealth Management**, *Chartered Financial Planner*
- **Co-op Group**, *Senior Sales & Partnership Manager - Estate Planning*
- **Craufurd Hale Wealth Management**, *Head of Wealth Management*
- **Crawford Dean Wealth Management**, *Director*
- **Crocus Wealth**, *Investment Director*
- **Fairstone Financial Management**, *Chief Operating Officer*
- **Fairstone Financial Management**, *Independent Financial Adviser*
- **Finli (FLP)**, *Director & Independent Financial Planner*
- **Foster Denovo**, *Paraplanner Manager*
- **Handelsbanken Asset Management**, *Wealth Planning Team Leader*
- **Handelsbanken**, *Wealth Business Controls Manager*
- **Holden & Partners**, *Financial Planning Associate*
- **In Partnership Financial Advisers**, *Chartered Financial Planner*
- **Independent Financial Strategists**, *Chief Executive Officer*
- **Irwin Mitchell**, *Senior Manager*
- **Isio**, *Head of Wealth*
- **James Young Associates**, *Director & Independent Advanced Financial Advisor*
- **Kenwell Financial**, *Head of Financial Wellbeing*
- **Oakfield Financial Services**, *Managing Director*
- **Oakfield Financial Services**, *Paraplanner*

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- **PK Financial Planning**, *Director*
- **Parmenion Capital Partners**, *Commercial Director*
- **Pembroke Financial Services**, *Head of Advice Proposition*
- **Pembroke Financial Services**, *Paraplanning Manager*
- **People's Partnership**, *Head of Trustee Services*
- **Pharon Independent Financial Advisers**, *Paraplanner*
- **Pivotal Paraplanning**, *Director/Paraplanner*
- **RE Hutt Financial Services**, *Director*
- **RSMR**, *MPS Account Manager*
- **Redington**, *Senior Vice President, Defined Contribution Pensions*
- **Richardsons Financial Services**, *Director*
- **Simpson Wood**, *Compliance Manager*
- **St. James's Place Wealth Management Group**, *Divisional Director, Business Development & Advice*
- **Timothy James and Partners**, *Director*
- **Timothy James and Partners**, *Financial Adviser*
- **Titan Wealth Planning**, *Head of Proposition*
- **True Potential Wealth Management**, *Wealth Management Partner*
- **Walden Capital**, *Director*
- **Walden Capital**, *Paraplanner & Mortgage Co-Ordinator*
- **Weatherbys Banking Group**, *Wealth Planning Executive*
- **Wise Investment**, *Chief Executive Officer*